**Draft Minutes**

**Circulation Technical Group**

**In-Person – CCS Office**

**CC100 Tri-State International Drive, Suite 122, Lincolnshire, IL 60069**

**Friday, October 11, 2024**

**9:34 – 11:10 am**

**Attended by:** Mieko Fujiura-Landers (CCS), Debra Wischmeyer (CCS), Apisara Houltram (ALK), Belinda Husak (ALK), John Lavalie (DPK) Michelle Meyer-Edley (DPK), Dana Jenkins (DPK), Gabriela Mansera (EVK), Keri Carroll (DUK), Meredith Bernhardt (GRK), Rosa Lloyd (WGK), Donna Ramirez (WGK), Tori Sergel (LFK), Stephanie Haugan (LNK), Brent Michalski (MJK), Janine Wisniewski (MPK), Athena Crouse (NIK), Guadalupe Colin (PAK), Rosalie Scarpelli (PAK), Jennifer Sobel (PAK), Ann Thomas (PHK), Alisha Smaby (RLK), Matthew Hoffman (Wilmette), Kris Nichols (ZIK), Paula Pavelski (ZIK), Dustin Smaby (VEK)

1. **Call to order:** 9:34 am
2. **Approval of minutes from last meeting** - Approved as submitted
3. **Additions to the agenda**
* Unhoused Patrons
* Training – Incorporate “fun” elements?
1. **Officer reports**
	1. Chair: Dana Jenkins (Des Plaines) - none
	2. Vice Chair: Belinda Husak (Algonquin) – Attended Back in Circulation this week. Great conference, will be back in 2 years. Highly recommend.
	3. Secretary: Janine Wisniewski (Mount Prospect) – MPPL Officially in CCS!
2. **CCS staff reports – Debra Wischmeyer**
	1. **CCS Satisfaction Survey.** Going out today via CCS News. Current CCS Strategic plan wrapping up, getting ready to create a new one. Looking for staff feedback about how things are going. Looking for feedback in four areas: Leap, Staff Client, Simply Reports, PowerPAC. Due date will be November 8th. Debra conducted a brief walk-through of the survey.
3. **Old Business –** None.
4. **New Business**
	1. **Round Robin Introductions -** M. Fujiura-Landers/CCS - share your name, library, role at your library, and (optional) book/movie/podcast you’ve enjoyed recently
		1. Mieko – Member Services Librarian at CCS – “Great British Bake Off”
		2. Athena – Patron Services Supervisor at Niles – original “Addams Family” series
		3. Matthew Hoffman – Circulation Manager at Wilmette – Runs Pickwick classic film series in Park Ridge. Showing “Wolfman” this week.
		4. Stephanie – Head of Patron and Technical Services at Lincolnwood – “Howl’s Moving Castle”
		5. Jennifer – Member Services Assistant Manager at Palatine – *Quicksilver* by Callie Hart
		6. Rosalie – Manager of Member Services at Palatine – grandson is teaching her Minecraft
		7. Lupe – Rand Road Branch Manager at Palatine – *Yellowface* by R. F. Kuang
		8. Tori – Head of Circ and ILL at Lake Forest – Gosford Park, Field of Dreams
		9. Brent – Circ Manager and Interim ILL Coordinator at McHenry – *Lonesome Dove* by Larry McMurty (audiobook)
		10. Dana – Materials Services Manager at Des Plaines – Tarot for the Wild Soul Podcast
		11. John – Cataloger at Des Plaines– Colin from Accounts on Paramount Plus
		12. Michelle – Head of Patron Accounts at Des Plaines - “Nobody Wants This” and “Love is Blind” on Netflix
		13. Janine – Head of Circulation at Mount Prospect - “Nobody Wants This” on Netflix
		14. Keri – Account Services Manager at Fox River Valley – “M.A.S.H.”, and playing Stardew Valley
		15. Belinda – Asst Director of Operations at Algonquin – watching lots of college football, listening to Hilary Clinton talk;
		16. Apisara – Circulation Coordinator at Algonquin – “Matilda”
		17. Meredith – Public Services Supervisor at Grayslake – “Only Murders in the Building” and “The Old Man” on Hulu
		18. Alisha Smaby – Head of Circulation/Passport Manager at Round Lake – Genshin Impact video game; looking forward to new “Beetlejuice” movie.
		19. Dustin – Circulation Manager at Vernon – Genshin
		20. Debra – Director of Member Services at CCS – “Sailor Moon Crystal” listening to Oasis in anticipation of reunion tour
		21. Gabby – Circulation Manager at Evanston – coloring!
		22. Chris - Patron Services Supervisor at Zion-Benton – John Hughes Marathon
		23. Paula – Assistant Patron Services Supervisor at Zion-Benton – “Flintstones”
		24. Ann – Head of Circulation at Prospect Heights – *Tell me Everything* by Elizabeth Stroud; “Will and Harper” documentary on Netflix
		25. Rosa – Circulation Manager at Indian Trails – “Trigger Point” on BritBox and “Slow Horses” on Apple TV+; Re-reading *Bridgerton* books by Julia Quinn
		26. Donna – Circulation Supervisor at Indian Trails – looking forward to “Yellowstone” starting up again on Peacock
	2. **Merging Patrons - M. Fujiura-Landers/CCS**
		1. Post-Migration Merging: CCS identifies duplicate barcodes, check for duplicate data, merge records.
			1. Started with 3,360 duplicate barcodes after this migration. Have gone through 4 cycles of auto-merging, with one round to go.
			2. Once auto-merging complete, will manually review and merge
			3. Patrons excluded if key data points do not match (last name, first name, city, street number)
			4. Estimate that there will be about 1,300 records to manually review – can take up to a month.
			5. Staff will encounter duplicate barcodes during merge project. Staff can merge duplicate records if comfortable.
		2. General Patron Record Merges
			1. Can patron confirm record information? (ex: former address)
			2. Do other fields (Iike birthdate) match?
			3. Any relevant notes or blocks?
			4. Patron NOT there to verify info? Only merge IF:
				1. both records are registered to *your* library.
				2. Record matches on registered library, name, address, and birthdate
			5. Do NOT merge if:
				1. One or both patrons are not registered to your library
				2. Patrons are registered to two different libraries
				3. names/addresses do not match.
			6. CCS Patron Merging How-To Guide: <https://www.ccslib.org/l2-login?destination=training/patron-merging-guidelines>
		3. Web Reports – there is a report that shows who has already been auto-merged if anyone is interested in taking a look.
	3. **Claims Review –** M. Fujiura-Landers/CCS –
		1. Patrons can have up to 5 current claims at one time. If they exceed that number, their account will be blocked.
		2. Staff can claim an intra-CCS loan item without consulting owning library
		3. Libraries will consult their claims returned report.
		4. A claim will remain current/active until resolved by staff. Can be resolved by:
			1. The item getting checked in.
			2. The item manually being declared lost and the patron charged.
		5. If the claim is not resolved, after 1 year, CCS will delete the claimed item. Ahead of 1-year mark, libraries can decide if they will charge the patron for the claim.
		6. Use “items with a status of claims” report to track eligible items.
		7. Question: What if someone hits total claim limit of 100? Patron will be hard blocked. Mieko is going to take this to CCS to see if the claims limit should be re-evaluated.
		8. Resources:
			1. Claimed Items: Making a Claim: <https://www.ccslib.org/training/claimed-items-making-claim>
			2. Claimed Items: Resolving Claims: <https://ccslib.org/training/claimed-items-resolving-claims>
	4. **September Library Card Sign-Up Month Wrap Up –** M. Fujiura-Landers/CCS - How did your library promote Library Card Sign-Up Month?
		1. Des Plaines – Partner with local business for “show your library card” discounts. 25 businesses participated. Promoted on website, social media, flyers, etc. BUT – they’ve noticed card signups don’t seem to increase in September. Businesses were excited to participate, though. At the end of the month, library purchases gift cards from many participating businesses and raffle them off to patrons.
		2. Park Ridge – has done similar to DPK.
		3. Wilmette – Pop-Up events in library vestibule; attended French Market, Block Party, Food Truck Mondays event. Prize wheel at all events that promoted what you could get for free with your library card.
		4. Indian Trails – prizes for kids who got a new card.
		5. Zion Benton – Card Design contest. Partnered with local elementary school and junior high.
		6. Grayslake: Woodland Fairy Theme. Patrons who signed up for library card got a butterfly to add to display in front of library. Partnered with local high schools to sign students up for library cards over lunch breaks.
		7. Algonquin: Tie-ins with local restaurants. Transformer displays to promote for kids. Giveaways when signing up for card.
		8. Lincolnwood: Library card as “VIP” pass, but messaging was confusing for patrons. Thought it was a special library card they could get.
		9. McHenry - Bag Handouts with info about what library can offer for all new card holders and renewals. Gift certificates from local businesses. Anyone who checked out in-house got entered for prize drawing. Some outreach events in peripheral areas where library doesn’t have a strong presence.
		10. Lake Forest – Target different groups at different times of year. Prize drawings. More focused efforts throughout the year (singles, families, etc), rather than just September.
		11. Niles – Partnered with local Lou Malnatis – everyone who got a card got coupon for free small pizza.
		12. Bravo to Lincolnwood (and everyone who participated) for creating the Library Card video!
	5. **Unhoused Library Cards** – Meredith/GRK - this came up recently, and they realized they don’t have policy/plan for that situation. What criteria would patron need to get a card? What address would you use? How long would card be good for? Any restrictions?
		1. Palatine – works with Journeys. Ask for Journeys ID or letter from case worker showing they’re registered with Journeys. Full-service card for 3 years.
		2. Round Lake – No policy, but recently had patron with a similar situation. Made an exception and gave her a card for 30 days. Restricted from LoT items.
		3. McHenry – Issue a temporary card. Restriction on amount of material (5 at a time), restricted from LoT, etc. Patron needs something indicating they are staying at a shelter to apply for card.
		4. Fox River Valley – don’t issue cards, but do loan out materials for in-house use. Created in-house card to check material out to when giving to patrons to use at computers in library.
	6. **“Fun” Training ideas –** Dustin/VEK - do you do anything fun or interesting as part of your training plan?
		1. Lincolnwood – Not really, but do try to break it up. Have staff visit different departments. Deputy Director does a “scavenger hunt” around the building. Head of Adult Services there has also done a scavenger hunt for his staff as part of their department training.
		2. Waukegan (secondhand from Mieko): Did software scavenger hunt when training on Polaris.
		3. DesPlaines – 3 floors for people to learn. Have created fun maps to help people navigate. Gives people a feel for building layout, as well as “vibe” of each floor.
		4. Mount Prospect: have done library scavenger hunts to help staff become familiar with the location of collections throughout the library.
	7. **Library News –** Share news or updates from your library!
		1. Zion Benton: started seed library about a year ago. Agreed to house it, let partner organizations do the heavy lifting. Seed-packing once a month. Distributed over 6,000 seeds in last year. Has been very successful.
		2. Round Lake: Looking at changing job descriptions and titles in Circulation. If you haven’t shared your job descriptions yet and would like to, please send to Alisha (asmaby@rlalibrary.org)! Looking to make job descriptions more inclusive.
		3. Fox River Valley: also re-doing job descriptions.
		4. CCS is hiring for a member services associate. Know anyone who would be a good fit? Encourage to apply! Anyone interested in being on an advisory group? 2 openings on database management for Circulation staff. Review requests for new system policies, changing standardized practices. A cross-departmental group with Circ, Tech, Directors, etc. Interested? E-mail Deborah (dwischmeyer@ccslib.org)!
		5. Palatine: Materials Assistants (back of house). Conducted survey to see who was interested in working front of house. Had good response – added two of them to front-of-house to be able to sub. Also, winding down with 100-year anniversary of the library. Big kick-off in May with LEGO exhibit, mini-golf in September, raised money for lite-brite wall. Patrons able to purchase 100
		6. Mount Prospect – Renovation of lobby and Circulation workroom, new 13-bin sorter, some department restructuring. And finally live in CCS!
		7. Fox River Valley: Dustin Smaby gave a presentation on 1st Amendment Audits at Back in Circulation. Did tremendous job – good resource if you have questions about that. (seconded by Ann at PHK).
		8. Lincolnwood: had 1st amendment audit this week. Went fine, but he *did* get stuck in a program room. Also, Stephanie at Lincolnwood would like you to e-mail her any barcode scanners you’re using and like.
		9. Palatine: Winding down with 100-year anniversary of library. Big Kick-off in May with LEGO; Mini-golf in September; Raised money for lite-brite wall. Patrons could buy 100-year anniversary merch.
5. **Adjournment –** Motion made by Tori Segel (LFK), Seconded by Keri Carroll (DUK). Meeting adjourned at 11:10 am.