



SWAN Advisory: Circulation Advisory Notes

Wednesday, November 20, 2019, 9:30 AM – 12:00 PM
RAILS Burr Ridge Main Meeting Room

Members:

1. Stephanie DeYoung (Batavia Public Library District)
2. Sue Feddersen (Bensenville Community Public Library District)
3. Sandra Leyva (Alsip-Merrionette Park Public Library District)
4. Julie Lombardo (Woodridge Public Library)
5. Victoria Muraiti (River Forest Public Library)
6. Cheryl Pawlak (Downers Grove Public Library)
7. Debbie Sheehan (Indian Prairie Public Library District)
8. Brittany Smith (Westmont Public Library)
9. Peggy Tomzik (Eisenhower Public Library District)
10. Thomas Webb (Matteson Public Library)

Facilitators:

1. Crystal Vela, Chair, Consultant, User Experience, SWAN
2. Sam Dietel, Consultant, Bibliographic Services, SWAN

Agenda/Notes:

- I. Welcome and introductions

Crystal welcomed the group and new Advisory members. Election results were shared with announcement of the following members elected for a 2-year term.

Jeri Cain (Carol Stream Public Library)

Sandra Leyva (Alsip-Merrionette Park Public Library District)

Victoria Muraiti (River Forest Public Library)

Debbie Sheehan (Indian Prairie Public Library District)

Christine Sporleder (Bloomington Public Library)
Peggy Tomzik (Eisenhower Public Library District)

Thanks to all candidates. And special thanks to Julie Lombardo for her contributions to Circulation Advisory.

II. Minutes from September Planning Session [Exhibit A]

Planning session in September was at Thomas Ford Memorial Public Library. The discussion included how the circulation policy can evolve. Circulation Advisory submits recommendations to Aaron Skog, Executive Director, for review and determination of Board action.

III. Circulation policy changes [Exhibit B]

Discussion of the redlined Circulation Policy resulted in the following recommendations.

Section 2. Holds

There was discussion on 2.A. regarding language of SHOULD vs MUST. Since there are times when exceptions are made (e.g. patron has item in hand), it was accepted that language would be:

2.A. Hold queues should be honored.

Add the following to this section.

iii. Hold queue reordering follows best practice.

2.C. Each SWAN library is required to physically process the "Clean Holds Shelf" report at least Monday through Friday. Items on hold shelf must reflect the item's status.

2.D. Pick-up dates are not to be modified for items on the hold shelf.

2.E. REMOVE

Section 4. Financial Concerns

There was discussion on billing each other's patrons; however, this is difficult to discourage if manual fees are incurred for checking out material at a library.

4.C. All charges must be accepted at any SWAN library. On a quarterly basis, SWAN debits and credits SWAN libraries for material replacement costs.

4.G [previously 4.H] Reimbursement for non-returned SWAN materials will be 365 days after due date. In order to abide by ILLINET ILL code, Non-SWAN libraries will be reimbursed 240 days after due date. All reimbursement will be processed on a quarterly basis.

4.H. [previously 4.G] Once the item has been reimbursed through quarterly billing for all lost ILL/RB, monies will not be refunded.

Section 5. Lost and claims returned items.

5.A. The Mark Item Lost wizard should be used only when payment is made.

5.B. The user Claims Return wizard is used only by SWAN staff for ILL/Reciprocal Borrowing

transactions. This is done in consultation with the user's home library.

5.C. REMOVE

Section 6. Patron accounts/records

6.E. Academic and special library cards are not valid for use at a public library.

6.F. REMOVE

6.G. REMOVE

IV. Damaged proposal [Exhibit C]

At the September planning session, billing concerns were raised specifically due to the complexity of the process. Too much time is being spent on processing damages.

In reviewing data, there is no real discrepancy in how libraries are reimbursed for damaged items, so discussion focused on how to efficiently and fairly handle damaged items.

Discussion questioned whether a change in how damaged items are identified and processed would not lead to more problems. The biggest concern with damages is dealing with communication back and forth and finding a more expedient way to resolve the "iffy" situations. The current process works well for obvious intentional damage, while it creates challenges when assessing normal use conditions.

Given the discussion and no clear solution, this topic was tabled. Existing procedures and best practices should be followed as is.

V. Legal opinion on website [Exhibit D]

There was interest in linked cards and the financial responsibility of children, which was discussed at the October Circulation Users meeting. SWAN had previously requested legal opinion on this matter and these legal opinions are shared on the SWAN Support Site.

Link: <https://support.swanlibraries.net/documentation/66923>

VI. ILA survey update – Hold Wrappers [Exhibit E]

The September 25th newsletter from SWAN addressed this topic and asked members to participate in the ILA survey.

Results of the survey and RAILS, ILA, and Illinois State Library action/recommendations will be shared, when available. Their recommendations will serve as guidance for SWAN in implementing any changes required.

VII. Trainings

Crystal shared SWAN's ongoing commitment to develop and offer training for the members. She

requested ideas and volunteers from Circulation Advisory members to assist.

Topics surfaced including:

- a. Quarterly Billing – illustrate through the life cycle of a bill
- b. Billing procedures – including common processes/mistakes in manual billing
- c. New Circulation Manager training – Victoria volunteered to assist
- d. Onboarding – SWAN support, Circulation Policy, OTRS
- e. Key reports and how to process – Debbie & Peggy shared this content at a Circulation Users meeting
- f. Panel discussion on going fine-free

VIII. Next Meeting

The next meeting of SWAN Circulation Advisory will be on Wednesday, January 22, 2020 from 9:30 AM – 12:00 PM (RAILS Burr Ridge Main Meeting Room).

<https://www.librarylearning.info/events/?eventID=30236>

Attendees:

1. Felipe Altamirano (Maywood Public Library District)
2. Crissy Barnat (Clarendon Hills Public Library)
3. Marla Cole-Wieringa (Matteson Public Library District)
4. Claudia Corzine (Forest Park Public Library)
5. Francisco Cruz (Cicero Public Library)
6. Irene Emanuel (Franklin Park Public Library District)
7. Juan Estrada (Lansing Public Library)
8. Nathan Hare (Oak Lawn Public Library)
9. Leslie Hartoonian (La Grange Public Library)
10. Mary Moss (Elmwood Park Public Library)
11. Mary Ann Pyrzynski (Tinley Park Public Library)
12. Sue Ross (Midlothian Public Library)
13. Norma Rubio (Crete Public Library District)
14. Pat Sinacore (Westchester Public Library)
15. Karen Skocik (Palos Heights Public Library)
16. Manuel Vasquez (Grande Prairie Library District)
17. Elizabeth Wald (Chicago Ridge Public Library)
18. Debbie Walsh (National University of Health Sciences)
19. Debbie Weishaar (Crete Public Library District)
20. Teri Wilson (Green Hills Public Library District)
21. Jane Young (Acorn Public Library District)
22. Mary Zappa (Franklin Park Public Library District)

SWAN staff in attendance:

1. Dawne Tortorella (SWAN)
2. Vickie Totton (SWAN)
3. Tara Wood (SWAN)