Committee members present: Sandra Leyva (AMS), Julie Lombardo (WRS), Cynthia Maiello-Gluecklich (MPS), Victoria Muraiti (RFS), Debbie Sheehan (INS), Cheryl Pawlak (DGS), Jessica Nawrocki (FRS), Roberta Richter (LPS), Brittany Smith (WMS), Peggy Tomzik (ESS), and Sue Feddersen (BVD)

SWAN staff present: Crystal Vela, Vickie Totton, Dawne Tortorella, Samantha Dietel, Rudy Host Joseph Miller, Dave Pacin, and Michael Szarmach

Visitors present: Juan Estrada (LSS), Francisco Cruz (CIS), Sandra Baumgartner (CIS), Irene Emmanuel (FPD), Elizabeth Dejong (SHS), Mary Moss (EPS), Sandy Frank (TFS), Norma Rubio (CTS), Felipe Altamirano (MWS), ), Stephanie Deyoung ( BLD), Jeri Cain (CSD), Pat Sincore (WCS), Krystal Gonzalez (FPD), Martyn Churchouse (OPS), Don Medrala (BVS), MaryAnn Pyrzynski (TPS), Debbie Walsh (NUD), Sharon Shroyer (RSS), Linda Dupree (BWS), Mary Malach (MED), Bridgette O’Hallaran (STS), Debbie Weishaar (CTS), Nathan Hare (OLS), Karla Alba (SFS).

1. Introductions
   - Housekeeping
     SWAN will provide coffee and treats for Circulation Advisory meetings

2. ILA Luminary Nomination
   Aaron submitted a letter of nomination, including biography and timelines of accomplishments to the ILA Executive Board nominating Kate, on behalf of SWAN board, staff, and members as an ILA Luminary.

   Kate will be honored at SWANx. Julie Lombardo is collecting donations on behalf of Circulation Advisory for honoring Kate as an ILA Luminary.

3. Review of Notes, May 16, 2018
   Notes were reviewed and approved without modification from May 16, 2018. Upon approval, notes will be posted on the SWAN support site for reference and archival purposes.

4. Circulation Advisory Committee Charge
   Dawne read the Circulation Advisory Committee Charge. All agreed it was accurate.

5. Patron Information Display in Workflows (continued action from May meeting)
   - Display User Address tab: state removed, email address added. Some committee members mentioned that their staff did not really notice the change, but when it was highlighted, they agreed it was a helpful change.
   - Identify User section - if a field is populated it will be displayed.

   Comments:
   - MPS/WMS - reduced visibility of checkouts/holds, etc in the Checkout mode if this is turned on.
• WRS - Checkout mode could have a cluttered screen, can’t display all the extra information
• FRS - Likes to use to make sure it’s the correct patron.
• LPS - Thought it would help w/notes being read but realized that notes are already displayed in Checkout.
• Vickie - suggested photos, MPS uses them already.
• Rudy - Illinois does not require updated licenses
• MPS - asked if we could test this, ESS seconded based on User Groups positive response
• Action: SWAN will send out a link to test, asking that all departments test all screens. Will give us 2 weeks to test. Asked for feedback, screenshots, etc.

• **Address and Extended Info Field Consolidation** - Sub-Committee meeting 7-24-18 to review the data in the Address and Extended Info fields. How can this info be consolidated? Needs to be completed before NCOA.

Per Vickie - SWANcom coming later today concerning Patron Clean Up Reports. Starting August these reports will be sent to each library’s generic email address. These reports will begin running the 15th of every month providing three tabs/worksheets per library for review and correction:

• Wrong City: List of user records that have your Library and one of your User Profiles, but the city does not match your service area.
• Wrong User Profile: List of user records that have your Library, but not one of your User Profiles.
• Wrong Library: List of user records that have one of your User Profiles, but not your Library.

6. **Best Practice – ILL**

• Items sent through ILL require a machine readable barcode
  Codabar barcodes should be required for items which can be taken from your library. MPS suggested it be included in SWAN policy.
  Action: SWAN staff will include policy language for approval at next meeting
• Packaging material is not considered part of a circulation item piece
  All Circulation Advisory members agreed that packaging material is not part of a circulating item.
• Packaging material is not billable as part of an ILL circulation.
  All Circulation Advisory members agreed that packaging materials is not billable. Libraries can use packaging materials of their choice, but there is no guarantee that the item will be returned in the same packaging. Patrons often remove and leave the packaging material behind at the library before checking out the items. Libraries do understand that some of their consortium library partners want their packaging material returned. In these cases, libraries do return the packaging material to the sending library.
The Committee reiterated the desire to encourage resource sharing as much as possible. They also recognized that libraries who require packaging material to stay with the item may need to consider limiting circulation of those items to their own patrons.

Action: Committee requested that SWAN staff provide suggested language as part of Circulation Policy indicating that packaging material is not billable.

7. Bill Notice wording
   All are in favor of changing the billing notice wording at the bottom of the bill.
   From: “TOTAL AMOUNT DUE”
   To: “TOTAL AMOUNT DUE FOR THE ABOVE”

8. SWAN Updates & Discussion
   - BLUEcloud Analytics Tracking
     BCA tracking - Daily harvesting is delayed. SWAN is aware of issues - escalated to SD. SWAN trusts the information that is reported it’s just that the data is slow to be reported. To alleviate some of the issues raised with reports relying on “yesterday” data, SWAN is developing more “last month” and “last week” reports. These “last week” reports could be run daily providing a running daily metric that can be pulled, for libraries who need to record/report on daily statistics.

   - BLUEcloud Analytics Report – Cancelled Holds Notice
     The Symphony Cancelled Holds Notice reports are suspended. If you would like a report of cancelled holds, two reports are available in BCA listing these cancelled holds.
     SWAN Reports > Holds > Dynamic Dates > List Holds Cancelled Within Past Seven Days
     SWAN Reports > Holds > Dynamic Dates > List Holds Cancelled Within Past Two Days

   - Report Scheduling -
     - Combined Clean Hold Shelf Report, updated to include barcode
       Issues with Clean Hold Shelf report on Sundays due to long reports Saturday night.
       - DGS – We were told that we had to get the Clean Hold report all weekend or not at all but does it have to run on Sunday?
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- WRS – concerned that libraries have to scale back to accommodate limitations of the SD system. Willing to make temporary changes but not forever.

- Action: SWAN will provide options for Saturday and Sunday runs of the Clean Hold Shelf reports separately so that libraries can decide to run on Saturday, but not Sunday.

- Vickie report on consolidation of SMS and Email Pick up notices. Pick up notices are now sent 10, 2, and 6. This process of consolidation saved approximately 6-8 minutes of processing time on the system. The 9PM hold pick up notices a have been cancelled.

- SMS Bill Notice
35 minutes running. Advisory committee wants more information about the numbers as the number of notices send (0-10) seems low. When a patron says they want SMS they give them all their notices that way. They also encourage everyone to add an email since certain notices only go to email.
Action: SWAN will continue to work with SD on why this report is taking so long and producing so few bills.

Discussion on System Performance/Report Scheduling:

Dawne - SWAN respects/understand Julie’s concerns. Assured us that SWAN is not trying to take away services. Will supply times that the Clean Hold Shelf report ran on Sundays for the past month and then determine what can be done. SWAN is working on an infrastructure upgrade and compatible with a system operating system upgrade. SWAN IT staff are working to coordinate all Infrastructure needs to minimize downtime and impact to members.

Rudy – IT is working behind the scenes, looking at performance and tuning. Goal is to have all maintenance processed complete by 6 AM daily. Currently our Saturday night convert discard/deletion process are running well past this 6 AM target. That creates a cascade effect on morning reports which are then delayed, sometimes into late afternoon.

To recap - reports are an issue but SWAN is working on it closely with SD.

- New bills for old overdue Fines - Database error after dedupe. There needs to be a process to clean them up daily – SD is running this process on our database continuously and we will ask how this process can be worked into our daily
processes.

- **Bounced email process** - Most libraries call patrons. Staff should be reminded that if they delete the email field by “blanking” it out, it remains as a blank email field. Instead, remove the email field altogether by using the red X.
  - WMS – call them, take email out and change preference to phone.
  - RFS – Removes the email and calls.
  - CIS – keeps getting them and not responding to them or doing anything because they are getting too many. Patrons also get mad when they call to try and correct.

9. SWAN Support Website Project

   SWAN plans to meet their December deadline for the updated website. Dec 4th launch date but probably not complete. Beta release the week before – SWAN plans to include Circulation Advisory in early review as we move forward. Two Members of Circulation Advisory (Cheryl and Cindy) were interviewed in depth regarding their use of the current website and information needs. Their input was included in the SWAN Support Site Interviews Summary Report (included with packet).

10. Agenda Building for Sept 19th meeting:

   ILL Discussion items
   Updates on reports
   Sub-Committee report
   Report on results of testing Identify Users
   October update on quarterly billing

   **Suggested Input/Development for Circ Adv:**
   Best Practices plan
   Scripts for crucial conversations – can we develop/share common dialog when speaking with users and explaining policy or speaking with colleagues at other libraries so that we are consistent and clear. This repository of crucial conversations could be housed on the new Support site as a resource for members.

11. Open Forum –

   - Rudy - hoping to expand the Patron Look-Up tool so it is accessible to Non-SWAN libraries.
   - Bellwood: Carpet Cleaning issues and are closed today.
   - ESS: Asked if libraries are including the database usage numbers
   - RFS: No processing fees
• ALSIP: Bi-Centennial, trying to get rid of YS fines to start off.
• LPS: wants to give their patrons a 40% discount on their billed items. Roberta will be looking to Cheryl for guidance about this since DGS already does this.
• Discussed DGS practice of charging only 60% of DGS billed items.
• LSS: fine free
• RSS: Looking for New Information Services
• WCS: is kayaking
• Geneva: Ground breaking ceremony