SWAN Circulation Advisory

Minutes – November 15, 2017

**Committee members present**: Sandra Leyva (AMS), Julie Lombardo (WRS), Cynthia Maiello-Gluecklich (MPS), Victoria Muraiti (RFS), Debbie Sheehan (INS), Cheryl Pawlak (DGS), Sandy Frank (TFS), Jessica Nawrocki (FRS), Roberta Richter (LPS), Brittany Smith (WMS), Sue Feddersen (BND)

**SWAN staff present:** Kate Boyle, Crystal Vela, Samantha Dietel, Vickie Totton

**Visitors present:** Martyn Churchouse (OPS), Mary Zappa (FPD), Irene Emanuel (FPD), Pat Sinacore (WCS), Jane Young (ADS), Debbie Walsh (NUD), Mary Moss (EPS), Leigh Ann Voss (RGS), Leslie Hartoonian (LGS), Francisco Cruz (CIS), Eric Bain (MAGIC), Michael Szarmach (MAGIC), Bridgette O’Halloran (STS), Sarah Brown (RPS), Manual Vasquez (GPS), Nathan Hare (OLS), Martha Kennedy (HDS), Bonni Ellis (SCD), Juan A. Estrada (LSS), Lisa Knasiak (HDS), Norma Rubio (CTS), Debbie Weishaar (CTS), Martha Cole-Wieringa (MTS), Thom Webb (MTS)

Thank you to Brittany for bringing treats this month.

**Discussion Items**

**Updates to Circ Policy**

**Fine Free staff profile?**

Kate announced that a couple libraries have requested a profile for staff that is fine-free regardless of where the person travels. It was pointed by one library that staff cards are illegal unless they are counted as part of your compensation package. As staff compensation would be local library policy, this doesn’t fit into the SWAN Circulation policy.

There was also a discussion about fine free Homebound, local use only, and special “gold” cards. It was suggested these would all also be illegal according to Illinois Library Statutes. SWAN staff will investigate further and continue discussion at the next Circ. Adv. Meeting.

The consensus is that this doesn’t belong in SWAN policy and that there is a procedural answer to this question that needs to be handled locally and in-house.

**Hold shelf should specify 7 days only?**

At present, the policy reads “at least 7 days”. We propose to change this to “7 days only”. A question was raised as to whether we would need to add to policy that you must run your clean holdshelf report every day. It was determined that it is not feasible for all libraries to run the clean holdshelf report every business day.

A discussion followed concerning what happens when a patron calls and asks staff to set aside a book. Some hold that book for 3 days. Many libraries, however, place a hold and leave that item on the hold shelf for 7 days and touted the benefits of doing this.

It was suggested we lower the number of days on the holdshelf to 5, and it was pointed out that patrons will have much less opportunity to pick up a hold, especially because days the library is closed are counted as days on the hold shelf. There is also a concern about how patrons would be notified of this change. SirsiDynix has a long-standing Enhancement Request about changing the coding so that closed days are not counted as days on the hold shelf, and perhaps SWAN can throw its weight behind that.

The committee voted on changing the verbiage to “7 days only” but not adding that libraries must run the Clean Holdshelf Report each day the library is open. Vote: unanimously in favor to amend the policy.

**Report RB/ ILL hold activity**

Vickie led the discussion of Chicago and Non-SWAN Reciprocal Borrower Enterprise hold activity over the last 6 weeks. Many were concerned that this would increase active holds. There has been a slight increase for Chicago patrons but a slight decrease for Non-SWAN RB patrons.

It was noted that most holds were picked up at the hold placement library. Also, most holds were filled by the hold placement library, so ILL has not been affected.

This led to a discussion about whether local items have priority for filling holds. The answer is “no”. This is part of SWAN’s hold attribute configuration with SirsiDynix, and items for holds are selected at random. There is a hold attribute SWAN could turn on that would allow local, available items to fill the hold first, and discussion built around the pluses and minuses of implementing that setting. SWAN will review hold configuration with SirsiDynix, especially the “random item selection” setting and report back at the next Circ Advisory meeting.

A question was raised about unfilling a hold on the Onshelf Items with Holds list. Is this still necessary? Documentation previously went out stating that this is necessary. SWAN will consider this and report back, sending out updated documentation if need be.

Vickie displayed the appendices that helped inform the “SWAN Reciprocal Borrowers: CPL & Non-SWAN Patrons” document. She also discussed the recommendations outlined in the document, including creating a consortium-wide practice for this.

**Missing on hold shelf user**

Vickie discussed the use of this Generic User. First, all items missing on holdshelf should be checked out to this user, not just ILL materials. Second, we have many items checked out to this user five months after it’s implementation. We need to evaluate what should be done with these items and whether we have noticed any trends. She asked for any recommendations for what to do with these items. A shelf check was recommended. SWAN will create a report in BLUEcloud Analytics that libraries can use to run shelf-check lists.

Even after running shelf-checks, libraries wonder what to do with these items. Items have been checked out since July of 2017. There are 242 items currently checked out to MISSHLDSHLF, and not all libraries are using this process at this point. Since this is still a trial process, the consensus was that we cannot make any decisions about what to do with these items until all libraries are on board. SWAN will send a memo discussing the need to use MISSHLDSHLF, the steps to take, and the BCA report that will be available.

A question was raised about the monetary impact of using this Generic User and how reimbursement should be handled. Vickie pointed out that it is in our policy that we don’t reimburse for items in transit, so that negates the issue. More discussion concerning what to do with these items and how reimbursement may be handled will be needed.

**New "Shelf check” report of previously reimbursed items now circulating**

Vickie reported that Helen Pinder of SWAN created a shelf-check report for items that had been previously reimbursed but are now circulating. SWAN will be sending out a SWANcom about this so people can find these items for flipping.

SWAN is moving toward a billing model where libraries will be debited and credited once materials have been billed for 365 days. Once that is implemented, there will be no more flipping of monies. This has not yet occurred, so it is important to still run shelf-check reports like the one recently created. There is an additional shelf-check report available in BCA to find items overdue for 30 days. Libraries can use this as a “pre-billing” shelf-check report.

**Updates**

**Training Calendar (also available and open for registration on L2)**

Kate handed out a training calendar for the New 19 but explained that these classes are open to all SWAN members. Registration is now open. She called for any volunteers to host classes with venues still unassigned.

It was asked if these sessions will be recorded. Hosting libraries have the option to record, but SWAN does not plan to record all sessions. Lauren of SWAN Member Services is actively working on many tutorial videos that will help train those that cannot attend.

SWAN Bib Services will be going out to libraries and conducting their trainings on-site.

**Best Practices ---- we are still collecting your suggestions**

We are still looking for best practices, please send them in so we can compile them in our Best Practices document.

**Long Overdue Report**

The report is still in the testing phase. Libraries on the subcommittee that have been involved with testing reported that they like the process.

The testing phase exposed some opportunities for cleanup – users that have your library but not your user profile or vice versa. Vickie suggested that people run a List Users report in BCA to find these users and clean up their records, especially given the upcoming migration. The data load will match users on barcode, so making sure our database is as clean as possible is important.

The Long Overdue report will be run by SWAN, and it will be available at a future date. We don’t have a date of release yet, because all libraries need to be caught up and informed. We hope that it will be live in the coming months.

**User Groups**

Crystal provided an update on where we are with User Groups. We are still working on documentation and Lauren will be filming a tutorial as well as part of the program. SWAN will send it out and turn on the User Groups tab for all libraries as soon as it is ready.

**Other**

Kate reported that SWAN has alphabetized all libraries in the search window in Workflows, so items at newly added libraries no longer list at the bottom.

Swipes are also being installed with the help of Dave Pacin. Swipes can be requested by using the webform on the SWAN support site.

**What’s New:**

**DGS:** Reported many staff changes, as well as a new Assistant Director.

**WRS:** Q: Have instructions gone out explaining how to properly fill out routing slips? A: Not yet, but SWAN is working on it.

Q: What happens when someone’s email address is bad and there are bounced emails? A: Steven from IT will be working on this but it is not yet functional.

**FRS:** Their bookmobile has been gone for a few years, but they still have an agency of FBS. They plan to transfer FBS items to storage. Several staff are retiring soon.

**BND**: Construction outside of the library is thankfully almost finished.

**LPS**: Q: When will the patron purge be done? A: Hopefully in January 2018.

**WMS**: Q: Did SWAN determine why patrons were no longer getting overdue notices because of auto-renewal? A: Yes, SWAN fixed it.

Q. Has anyone noticed a decreasing rate of materials returned after collection agency action since UMS stopped credit reporting. WMS is getting less back but is also sending larger amounts of patrons with higher sums owed. A. Most did not observe this downward trend of returned materials.

**WCS:** Just finished a new club house in the youth department.

**CIS:** Q: What do libraries do when parents are divorced and each parent lives in a different town? Does a child get one card or two? A: The child gets two cards, and each should have a note. Also use the “care of” line to indicate which parent is responsible for each account.

**HDS:** Q: Are routing slips that are preprinted with your library name and address available so staff doesn’t have to stamp each slip? A: They are available but expensive. Kate also pointed out that we are still working with SirsiDynix to roll out other preprinted slips with the Restick printers.

**LSS:** Reports changes in staff.

**OPS:** Having a new sorter installed in December. They will not be closed during the install.