Circulation Advisory Group Minutes
March 22, 2004 meeting

Present: Gail Nichols (UCD), Andy Panado (UCSF), Don Sloane (UCLA), John Bareford (UCI), Jon Edmondson (SRLF), Jonathan Thomas (UCB), Lisa Clark (UCSD), Loes Knutson (UCR), Lucia MacLean (UCSC), Raleigh Elliott (UCD), Claire Bellanti (SRLF), Claudia Jiménez (UCSB)

Absent: Scott Miller (NRLF)

Blocking Proposal - The proposal before CAG to block their own campus patrons who have outstanding materials or fees at other UC campuses has been sent to RSC for reconsideration. So far RSC has not made a decision as to how to proceed on this specific proposal. SOPAG wants 'guidelines' for blocking instead of definite rules. Concern was expressed about consistency among libraries in enforcing a stated rule as opposed to observing guidelines.

> RSC suggested that whatever the final disposition of the blocking proposal, it be included in a Resource Sharing Manual of ILL and Circulation procedures to be developed once implementation of VDX is well on the way, so that we know what direction to take. This proposal is based on the idea that once VDX is fully functional circulation units will be more directly involved in the delivery of ILL materials to the users.

> C. Bellanti suggested that CAG should begin to work on identifying a list of issues that need to be dealt with by all campuses for the manual. She suggested two initial topics:
>   1.   The method each campus prefers other campuses to verify student status;
>   2.   The guidelines for blocking patrons with outstanding charges.

> Andy Panado will continue to serve as chair of the working group on blocking guidelines. They will turn their focus to working on a Resource Sharing Manual. CAG will ask for additional volunteers at the circulation heads meeting on Tuesday. C. Bellanti will ask G. Nichols if she wishes to serve a liaison between the working group and RSC.

1. **Policy on External Borrowers** - In 2002 CAG surveyed all nine campuses to identify the differences in library privileges for external borrowers. This information was distributed to each campus in a large white binder. Some of the information is now out of date. The question arose what to do about keeping the information current? CAG decided not to update the information due to current staffing limitations at each campus as well as other more pressing issues. It was decided however, to mount the External User Survey / Directory on the CAG website.

2. Campus directories to contact for verification of borrower status - Because campus directories become out of date very quickly, and not all campuses have openly

available web sites with registration information, C. Jiménez suggested that campuses rely on telephone contact to verify student status. Only UCB and UCD have web sites that are current for verification.

G. Nichols informed us that UCOP has a database that provides employment information. They are currently working on providing universal access to this database. UCD is the only campus that currently has access to their portion of the database. Telnet access is currently the only method of obtaining information.

An around the table survey of each campus' access to personnel and student information for verification purposes:

UCB - employee information is loaded into the patron database on a monthly basis. New employees can obtain a photo ID from campus photo which the library uses to enter a record into the library's patron database. Student information is updated every other day.

UCD - ?

UCI - the library receives a tape load of student information from the registrar and from campus human resources for faculty and staff. This is done quarterly.

UCLA - the library has access to the campus information system for verification of some, but not all staff.

UCSB - there is a weekly upload of student information. The library has limited access to the campus personnel file for verification of employment.

UCSC - students receive stickers when they register. The library receives a paper list at the beginning of the quarter of students who have registered. Faculty and staff receive an ID card that the library uses to create a library card.

UCSD -A download of student information is done daily. The library has to manually update information for students who withdraw. Records for faculty and staff who separate is done immediately.

UCSF - Campus human resources does a monthly update of current students and staff. The library has access to this database of profiles.

UCR - The library has access to the campus employee database for verification purposes

C. Jiménez requested that each library submit to her the method they would prefer other campuses use to verify affiliation. She will have it posted on the Circheads web page.

3. Best Practices workshop - CAG has been working on a proposal to do a workshop on the ERes best practices. C. Jiménez suggested that CAG make a decision as to whether this topic is substantial enough to ask RSC to fund a workshop. L. Knutson suggested that because circulation and reserves are not unified functions at all libraries, this topic would better lend itself to being the subject of information sharing at a circulation heads meeting rather than a full blown workshop. C. Jiménez suggested that we follow Loes suggestion and there was unanimous agreement to do so. D. Sloane suggested that we include other topics like ERes as information sharing items at future circulation heads meetings.

G. Nichols suggested that any future best practices workshops be done by the northern and southern campuses meeting separately. This would make it financially more feasible. D. Sloane suggested that we ask for volunteers to work on addressing the issue of best practices workshops.

There are many other topics that the group thought should be dealt with as discussion topics. It was decided to have a brainstorming session at the end of the meeting to gather these topics and as ask the entire circulation heads group to rank in order of priority.

4. Election of chair-elect - Claudia Jiménez (UCSB) began her term as CAG chair. The group decided that the chair and incoming chair-elect would serve only one year terms in those positions. Loes Knutson (UCR) volunteered to serve as chair-elect for the next year. She was elected unanimously. The group agreed that next years meeting would be held at UCSC.

5. Brainstorming - The CAG came up with the items below as potential topics for information sharing at future circulation heads meetings. We will ask the circulation heads for their preferences for our Tuesday meeting.
   * Reserves practices
   * Training of students and cross-training
   * Merging of service desks - reference/circulation/reserves
   * Self-service options-renewals/charging/discharging/recalls/holds/
   * Non-circulating material/special collections-handling/use
   * Stacks maintenance-shelving/searching/shifting/shelf reading/weeding/withdrawing
   * Use of computers in public service areas.
   * Staff development-Which staff attends meetings/what kind of meetings are available to which staff?
   * Student tasks v. staff tasks-Is there an overlap of duties? How do these duties compare across campuses? What are student wages? How are evaluations and discipline handled?
   * Analysis of functions and workflow for campus circulation staffs.
   * Universal discharging
   * Fees-holds/non-pickup of requested material
   * Managing public spaces
   * Discharging material-monitoring due dates/date due receipts/no longer supplying date due information.

6. Web page - Concern was expressed about the CAG web page being out of date and not being currently maintained. It was agreed upon that we would ask for a volunteer at the circulation heads meeting to take over the management of the CAG web page.