**FAQ for Local Holds/Use pilot project**

Last Updated: September 30, 2022

NOTE: If your library is *not participating* in the Local Holds/Use pilot project, please let your staff know that they *should not be selecting the BKALH14 item type* for your materials. Local Hold Circulation Rules have only been set up for libraries participating in the pilot.

**Pilot project timeline: July 1 through December 31, 2022.** Participants can add new BKAFI items with Local Hold/Use parameters up until the last day of the project.

**NEW! Q. How should we handle On Order items?**

A. Libraries who add item records at the point of order via GetIt or by entering a BSE/Item record **should not assign the BKALH14 Item Type until the item has been received in hand by the library**. This is for a couple of reasons:

* The BKAHL14 item type prevents patrons from the non-owning library from placing holds (depending on the presence of other items on the bib record). Patrons should be able to place holds on these titles while the items are on order. This causes less confusion for patrons, and allows selectors to gauge demand.
* Items should only have the BKAHL14 item type for up to 60 days. It isn’t uncommon for materials to be ordered 60 days (or more) in advance of their availability.

When On Order items are received in hand by the library, then the library can process the items as Local Hold items by assigning the BKALH14 Item Type and the Custom Item Status of Local Hold. When the item is checked in, it will only fill Local Holds for that library, even if there are holds for other libraries on the bibliographic record.

**Q. What does the work flow look like to set and remove the local hold only item status? Is this automated or do libraries have to change each individual item at the end of 60 days?**

A. See the document “[Workflow for creating Local Holds/Use item records](https://www.scls.info/sites/www.scls.info/files/2022-06-15%20Workflow%20for%20creating-removing%20Local%20Holds_Use%20item%20records.docx)”. Libraries will need to manually change the items at the end of the 60 day period.

**Q. Is 60 days a long enough time period to have any meaningful impact for local patrons?**

A. The Workgroup recommended 60 days for the pilot project. During the pilot, the workgroup will solicit input from participating libraries. If the project is approved following the pilot period, the Workgroup, ILS Subcommittees and ILS Committee can re-assess the parameters.

**Q. What are the anticipated next steps after the pilot project?**

A. The Workgroup will work out next steps if the decision is to make a recommendation to the ILS Committee to move forward with “local holds”.

**Q. Would adopting local holds only be up to each library or a SCLS-wide change?**

A. Not all libraries are participating in the pilot project, so the Workgroup will be able to monitor any issues that occur as a result. During the pilot project, we plan to survey other Wisconsin systems and libraries to see how they manage this. We cannot answer this question now, but the Workgroup will make a recommendation to the ILS Committee regarding this topic.

**Q. How is SCLS or individual libraries tracking or measuring the results of the pilot? How would success (or not) be measured?**

A. The Workgroup identified some areas of data that we may measure and the data team at SCLS is working on reports to measure data before the project and during the project. We do not know if we will be able to see trends, but that is the goal. Please see the [notes from the May 17 Workgroup meeting](https://www.scls.info/sites/www.scls.info/files/local-holds-work-group/2022-05-17-local-holds-notes.htm) which lays out concerns and proposed data dimensions to help assess the project.

**Q. We would find it helpful to have promotional/informational materials to share with patrons about the pilot to explain why new items are available for local holds only. (Already shared with my cluster rep).  It may be helpful to have talking points for staff for shared understanding and consistency**.

A. We are working on compiling Marketing materials and Talking Points for library staff.

**Q. Don't Miss Lists: These lists now include bibliographic records for titles, which may only have items available for local holds.  We've already had a patron encounter this in LINKcat and they were confused why they couldn't place a hold on the title.  With more libraries participating, this is likely to happen more often.  If all libraries owning a popular & new title are participating in the pilot, patrons will not be able to place holds on these titles using LINKcat until an item with no hold restrictions is added to the bibliographic record.  There should be communication with staff on whether they can place holds for patrons in this circumstance (we were told this is ok) and information for patrons as this may mean they can't place a hold on a new title themselves until the 60 day window is over**.

A. Yes, this scenario can happen if a bibliographic record(s) is added to the Don’t Miss Lists, and the only item(s) on that record have the Local Holds Item Type. In that case, only patrons from that item’s owning library could place holds. Library staff may place holds on these records on behalf of patrons. The holds will become available to those patrons after the Local Holds Item Type is removed.

The script for the Don’t Miss list is complex and primarily extracts titles based on the date the title was added to the catalog (which is not always the date an item is available for circulation), as well as the publication date. It would be a long term project to attempt to modify the script to exclude bibliographic records where the only item(s) on the bibliographic record has the Local Hold status or Item Type. If we wanted to then make the title appear on the Don’t Miss Lists after there was a non-local item(s) that would be an added layer of complexity to the project.

Until we start the pilot, we don’t know how often this might happen. The Workgroup will discuss the ramifications of applying the Local Holds Item Type to an item that is the only copy in the system.

**Q. What feedback from staff would the workgroup like during the pilot and how should this best be provided?  Does the workgroup wish to have any mechanisms for patron feedback?**

A. We will be providing a Google form to accept all types of staff and patron feedback during the pilot.

**Q. How do we track when items can be removed from local hold status?**

A. The pilot project period is a maximum of 60 days after adding items to the system. If you notice that your Local Holds/Use item is not circulating within your library prior to the 60 days maximum, you can change the item parameters earlier than 60 days. The steps for removing the Local Holds/Use parameters in located in the document “[Workflow for creating Local Holds/Use item records](https://www.scls.info/sites/www.scls.info/files/2022-06-15%20Workflow%20for%20creating-removing%20Local%20Holds_Use%20item%20records.docx)”.

**Q. At SUN, I think we were picturing having our items for the Local Use pilot interfiled with the regular new books. So the renewals restriction has me scrambling a bit -- do we need to put these items on a special display, and if so what kind of label or sticker will each library be using? I don't think there should be a renewal restriction -- if a patron has the item and there aren't additional holds, I think that patron should be allowed to renew it.  Otherwise, I feel like that patron is being penalized for picking up this item as opposed to a regular copy.  And if only one local patron gets the item in the 60-day window and then renews it twice, I think that's okay too. I do understand that Lucky Day items aren't renewable--and that's why we have them shelved separately. I do recognize that the workgroup has agreed on the renewals limitation, so I just need some recommendations on how libraries should set up their Local Use collections for the pilot, and I'd like the renewals limitation to be revisited if Local Use becomes permanent.**

A. The renewal limitation is the same as New items on a GENERIC record and many patrons are accustomed to not being able to renew new materials.

A. Some libraries will place these items with their other Lucky Day items. Some will interfile them with regular materials and place a different colored label on the item indicating NEW or Local Hold. Some will shelve with their Walk-in collection and some on their New items shelf. Since this pilot is focused on NEW Book, Adult, Fiction items, each library should decide how best to display these items for the benefit of walk-in patrons and also for library staff, who may find these items on the Holds Queue report to fill a local hold.

**Q. After the pilot starts on July 1st, will the MFD items that are currently set as local holds that do not fit the project parameters (i.e. format other than Adult Fiction like DVDs) have the local hold status removed or will their special pilot continue?**

A. Since we do not have pre-pandemic data to use as a comparison for the MFD data, MFD will continue with what they are doing until a decision is made regarding local holds for all libraries.

**Q. How will the mix of regular and local hold items on a bib record impact a patron's ability to renew items?  Specifically, if there are local hold items that have a status of available, but all the copies that are being shared are in use and there are some people waiting, will a patron still be able to renew an item if the number of local hold items available exceeds the number of holds? (I understand local holds only copies can't be renewed).**

A. This has not been specifically tested but we will provide an answer before July 1. As the items in the project are likely to be in-demand items, they generally will not be renewable anyway.