

LOCAL HOLDS ONLY INFORMATION

Proposed timeline for pilot

- April 6, ILS Committee discuss project and approve forming a work group
- Form work group to identify issues to study (including data)
- May 10, Circulation Services Subcommittee: discuss parameters for pilot
- May 19, All Directors—update on project
- June 1, ILS Committee vote on pilot project (June 15 through December 30)
- If pilot is approved, the project progresses as follows
- Recruit pilot project participants and begin setup
- June 15, Pilot project begins
- Work group continues to meet to study issues through November 30
- July 21, All Directors—update on project
- October 5, ILS Committee decides if vote should be done by ILS Committee cluster reps at November 17 All Director's meeting or December 7 ILS Committee
- November 17 All Directors meeting: Work group provide information on project
- November 17 or December 7 vote
- December 30, pilot ends

Proposed parameters of local holds only pilot

- Create a new Item Loan Type for:
 - Decide format: books?
 - Length of loan: 14 days?
- Custom status Local Hold has already been created
- Decide length of time new items will remain as local hold only: 45 days, 60 days, 90 days?

Libraries participating in the pilot will assign an item type and status to new materials to limit circulation to local holds (patron has same home library as owning library of item) and walk-in checkouts. Batch item edit may be used to manage changing these items to permanent codes after the defined length of time as local holds has been reached.

There are other decisions regarding the Circulation Issuing Rules that each library will need to make. Heidi Oliverson will oversee this process for participating libraries.

The following are records in LINKcat that display the Local Hold custom status.

Staff: <https://scls.kohalibrary.com/app/staff/bib/1666432/details>

Patron: <https://www.linkcat.info/app/work/1666432>

Parameters and function of reduced transportation holds (RTH) for comparison

How it works: When an item with holds is checked in, the system checks to see if there are holds at that library. If there are, it checks to see if the date placed for that hold is within 60 days of the oldest active hold in the holds queue. If it is, the item is trapped for the hold at the checkin library. If the oldest active

hold was placed more than 60 days from the hold at the checkin library, that hold is trapped and the system puts it into transit to go to the library for that hold.

The primary purpose of RTH is to keep items in the checkin library when there are holds at the checkin library, thus reducing transportation. This function also benefits libraries that have a lot of patrons that place holds in LINKcat. When a library receives a new title and checks it in, it will keep it at the library to fill holds for local patrons as long as the holds were placed within 60 days from the oldest active hold. The 60 day parameter assures that patrons who have placed a hold on a title for which their library does not own a copy will get the hold within a reasonable amount of time (i.e. all other holds do not need to be filled first).

Flaws with RTH: Some libraries have patrons that are more oriented to walking into the library to find materials than placing holds. In those communities, it is less likely that a new item will stay at the library to fill a local hold. For these libraries, the complaint is that once the item leaves the library and moves on to libraries with higher volumes of holds, it can be a long time before they see it again.

Comments from jamboard at March 17 All Director's meeting

The following are comments from the jamboard at the March 17 All Director's meeting. I have provided a response to some, but many stand on their own.

Comment: Why only have books in the local holds? Why not DVDs, etc.?

Response: This proposal is for the pilot phase. If local holds becomes permanent, it is possible that DVDs and other formats would be included.

Comment: Wendy- FCH We have been receiving local holds items from Marshfield to fill our holds, so I don't think this is working in Bibliovation.

Response: This was due to an error. A Marshfield staff person accidentally applied the "Local Hold" custom status to materials that should not have had that status.

Comment: I'm very curious to see what the impact will be on holds and the Purchase Alert Reports/member purchasing obligations. There may also be an impact on SCIDs. Susan, Madison

Response: We will add this to the list of things to evaluate.

Comment: Is it possible to hide records from patrons until a certain date so that we don't have holds being added for an item 6+ months before it comes out? That probably drives this problem somewhat. – BRD

Response: This is already possible. It is a local decision whether or not to place on order items in the catalog.

Comment: Would patrons have the ability to place holds on "lucky day" items since they are generic records?

Response: Libraries would choose if they want to put "lucky day" type items on the regular records and use the local holds only setup. Some libraries will still want to put "lucky day" type items on generic records. Both scenarios are feasible.

Comment: Wendy- FCH I think we would all like to see the exact data points that will be used to decide if this pilot is successful or not. I don't think that data can only come from the libraries that are

benefitting. / I agree with Wendy. RIO

Response: We will work on this aspect of the project, possibly with a workgroup.

Comment: A similar temporary measure was in place when FCH joined the system but it was for a much shorter period of time. - Jim (STO)

Response: Over the years we have implemented temporary measures to address different types of issues for new libraries, and even libraries that need to close temporarily due to disasters.

Comment: I feel like if this is approved long term, my library will have to drastically reallocate our collection funds into it whether we want to or not. Otherwise our patrons will be negatively effected by what other libraries choose to do. Wendy- FCH

Response: This would be something to monitor. Local holds on items would be for a limited period time (2 to 3 months based on comments).

Comment: Jill - MFD Local Holds is not the same as Lucky Day. These items do not require a separate record and can easily be changed to "normal" status.

Response: This is the case for MFD Local Holds. Libraries could choose to move their "lucky day" items to regular bib records using the local holds codes. However, they would not function the same way as the items will fill holds for local patrons (which is not true of items on generic records).

Comment: Is there, or can we get, an easily accessible calculated loan to borrow ratio for every library? MAR.

Response: This information is available on a monthly basis in the Library Statistics Summary <https://www.scls.info/ils/reports/about/aboutstatsummary>

I have requested a report that shows this for the 2021 ratio.

Comment: MAR loans 2-3 times what we borrow, what is the ratio for MFD?

Response: See above and comment below from Jill at MFD.

Comment: Jill MFD - We loan 3x what we borrow. (We know we are not unique in this.)

Comment: Some libraries are already negatively affected by all our new stuff going out and not seeing it for months. :(

Response: The local holds only parameters may help with this as it fills holds for your local patrons and if there are no holds for your patrons, the item will remain on the shelf in your library.

Comment: Steev, SUN - Local holds seems like a radical solution that may cause more friction among libraries. MFD as a net lender may even out over time, as it did with SUN. They are new to being in a shared ILS, and have a large collection, but it's not a given that they will continue to lend at this ratio forever.

Response: This was implemented for MFD on a temporary basis to see if it would alleviate the situation for them. Other LINKcat libraries have expressed interest in exploring local holds only for new materials.

Comment: If all libraries implement local holds only, will this be a detriment to our smallest libraries with limited collection budgets? - ORE

Response: This is something that we would monitor during the pilot. Local holds only is intended for only a limited time on new materials and some small libraries have requested such a practice in order to keep new items in their libraries.

Comment: I have concerns about this turning into a permanent option. I suspect it may increase wait times in general. Walk-in collections already exist to solve this problem. - Jim (STO)

Comment: Bailey, BER - The local holds pilot project seems to be in contrast to being in a system. As a stop gap for Marshfield's situation it makes sense, but otherwise it achieves the same thing as Lucky Day imo

Response: Many libraries cannot afford to purchase the duplicate copies required for walk-in or Lucky Day collections.

Comment: I don't want to see development time/money going towards local holds when there are so many more pressing issues (i.e. the self checks aren't working for renewals).

Comment: I think local holds is not a good idea. It goes against the whole purpose of the consortium and sharing resources. I am unhappy that SCLS is spending valuable development time on this side project when critical things are broken in BiblioVation (i.e. renewals not working on self-checkouts. problems with holds, etc.) MTH

Response: We do not anticipate that there will be new development required for this. There is some staff time required to set up the codes for each library, but it is not that different from changing a library from charging fines to going fine-free. This is part of the normal service that we provide. Fixing problems in BiblioVation is always a priority. The renewals problem with self-checks was an unintended consequence of a change in the 7.0 software upgrade. We will be prioritizing this problem with LibLime.

Comment: Wendy- FCH If the pilot is approved, I think any instance of payments/charges related to net lending/borrowing need to be removed from formulas.

Comment: Collection size is another element to consider. It is reasonable to expect that libraries with larger collections may loan more items which may be worth considering as this is evaluated. -ORE

Response: We will add this to the list of things to evaluate.

Comment: I understand why this was done for all the unique items at MFD, but I don't understand why new items were included without discussion at ILS/AC. This was already in place when we heard about it. It feels like an end run and it is not sitting well with a lot of libraries.

Response: Sometimes SCLS acts to assist libraries during times of critical need. In these situations, the measure put in place is temporary. The vast majority of libraries that joined LINKcat added their bibliographic records via a manual linking process. While time-consuming, it assures that there are fewer "duplicate" records. In the case of Marshfield, 35,000 bibliographic records did not match during their migration. This is more titles than the entire collection of nearly half of the libraries in LINKcat. This caused a situation where it was impossible for Marshfield staff to manage the outgoing holds as many of these titles were new and often appeared at the top of search results. In addition to this, the migration process was very quick compared to a normal migration due to the timeline imposed by the LSTA grant funding the project. There was not enough time to do proper change management and the staff at Marshfield had other difficult issues, such as managing the change in acquisitions workflow. SCLS worked with the library to alleviate a variety of issues, including the imbalance in lending and borrowing of holds.

Comment: Bailey, BER - I would also add that when space is the difficulty, it puts our patrons at a disadvantage when it comes to receiving newer items we don't have space to buy/store.

Comment: We are also intrigued by local holds, for a brief period of time. Having items circulate locally for the first 45-60 days seems fair to local patrons and to system sharing responsibility. smk@ree

Comment: Wendy- FCH Local holds feels like it goes against all the reasons that we have a shared ILS.

Comment: I like the idea of local holds only. My patrons are terrible about placing holds until a book is released. They also complain that "new books" are never here. – BRD

Comment: ACL - remember that small libraries outside of Dane county do not have good internet access. Local holds would allow our patrons to have access on the shelf by simply walking in to the library. The catalog sharing means that someone from Dane can walk in and get the book off the shelf, but they cannot get delivery until it leaves local holds.

Comment: Erick, WAU - I could only support this if it were for a brief time (1-2 months max). Even 90 days seems high. (EDITED as I misunderstood the 6 month part ;))

Comment: Jill - MFD Any item we purchase more than one copy of gets split - one for loan, one for local holds only. If we buy 8 new Pattersons, four go into the system.

Comment: MNT: With how our transition played out and our connectivity issue, some of our patrons are assuming we are not buying new materials because it's hard to keep them in. It's damaging our relationships with our patrons. This options would help build back that trust.

Comment: What happens in BRD is that the majority of our new books go out right away and we don't see them back for months. Having them here for a few months at first would better serve our patrons.

Comment: DCL is interested in local holds, but only for 1-2 months, and because we are so unique in our service. ~ Tracy

Comment: Local holds would benefit my patrons. Many do not have internet options to place holds or are older and simply do not understand the hold process. ROM

Comment: It's hypocritical to say that it's not okay for there to be local holds on physical items, but it's completely fine for libraries to have their own local advantage accounts.

Comment: SWLS has done local holds for years; we look toward them for more information.

Comment: I agree that it would need to be a short period, no more than 3 months for this to be more fair. – BRD

Comment: Jill - MFD The "local holds only" is 90 days. Our pilot project is 6 months to determine if there are any unforeseen hiccups.