

Report from Local Holds Only Workgroup to ILS Committee, May 24, 2022

Review survey results

39 SCLS member libraries responded to the survey (one is a non-ILS library)

Length of time that items will remain available for local use only

90 days = 9

60 days = 26

30 days = 11

14 days = 1

Formats to include (all are new items)

Books (all types) = 18

Adult Fiction = 18 + 18 = 36

Adult Non-Fiction = 7 + 18 = 25

Large Print = 3 + 18 = 21

Teen = 2 + 18 = 20

DVDs = 23

Audio = 10

Computer games = 1

Libraries interested in participating in the pilot:

No = 7

Maybe = 13

Yes = 18

How many libraries would vote on local use today:

No = 8

Undecided = 14

Yes = 16

Concerns:

The following is a summary of concerns expressed in the survey. The survey has more detailed comments and possibly some variations and all will be considered during the pilot.

- Will the time for holds to be filled increase, especially for small libraries that won't receive copies from the larger libraries?

- Will patrons have to wait longer for items not owned by the library?
- Will items sit on the shelf that would otherwise be filling holds at other libraries?
- Will total loaned/borrowing change as a result of the pilot? Will libraries who are not participating be affected?
- Will circulation go down, especially if patrons have to wait even longer for holds?
- Will patrons go to larger libraries if they can't get materials at the smaller libraries?
- Will libraries need to purchase more copies (especially browse copies) and increase their materials budgets?
- This will another layer of collection management and processing. How will libraries manage the process?
- If not all libraries participate, will there be a situation where libraries are forced to keep their items as local use only to avoid a situation where there is inequity of sharing?
- Will this cause an erosion of resource sharing system-wide?
- Will there be patron confusion over item status in LINKcat?
- Will there be more confusion for staff having a mix of walk-in and regular items on the same record?
- What impact will fine-free materials have on this?
- This may cause problems for some libraries who won't have enough display space if there new items stay in the library longer.
- If the pilot is discontinued and we don't make the change, will patrons be confused?
- This may be a disadvantage for libraries that cannot purchase any copies for a title or for libraries with multiple locations that need to distribute copies around those locations.
- 8 libraries had no concerns, or did not express any concerns

Benefits:

- Items purchased by the library will be available for that community's patron's holds, regardless of where the holds are in the holds queue.
- Rural library patrons and those who can't/don't place holds (due to lack of broadband or other issues) will have more equitable access.
- This will remove the disparity in the current catalog that favors online holds (rather than no holds, or staff-placed holds on behalf of patrons).
- Libraries that cannot purchase additional browse copies see their single new items leaving the library to fill holds at other libraries. Local use will allow libraries to have a browse collection of new items for local patrons.
- Taxpayers/supporters get what they pay for.
- For very small libraries, it allows their patrons to access popular materials more quickly.
- Possible reduction in delivery costs.
- May reduce the need to purchase additional "lucky day" type items.
- Patrons having access to local materials first may balance lending / borrowing ratios for some libraries.

- Larger libraries that are able to purchase 10 copies for one title and have 60 holds will see their items fill holds for their patrons.
- This may reduce processing if we no longer need to create generic records and “browsable” items can be on the same bibliographic record as “holdable” items.
- Collection management may be simpler if you no longer need to guess at how many items should be “lucky day.”
- We may be able to spend collection funds more efficiently and not have to purchase as many “lucky day” copies.
- There may potentially be shorter hold wait times for patrons.

Possible Data Sources:

Library Statistics Summary reports that can be used for Total Loaned and Borrowed comparisons to establish a baseline with pre-local holds pilot lending/borrowing ratios.

Holds filled latency report. This may assist with assessing changes in hold wait times.

Monthly circulation report for circ data for item types. This may assist with assessing changes in circulation.

Daily report of items “sitting” on shelves not filling holds.

Purchase Alert: can be monitored to assess if purchasing patterns will need to change.

Other tools:

- Batch item editor tool
- SCLS staff may be able to automatically change items from local use to standard use
- Form for libraries to report instances of patron frustration

Parameters for Proposed Pilot:

Number of days items remain in local use only status = 60 days*

This was the favored number from the survey.

Format: Adult Fiction

Books are the favored format, along with DVD and Audio. Since we are starting the multi-part DVD packaging change on September 1, it is recommended that we avoid DVDs. To keep setup and data collection simple during the pilot, using books only is recommended. 18 libraries suggested all types of books and this number was added to those that specified specific types of books. Of these, Adult Fiction and Adult Non-Fiction were the most popular. In order to keep the data as uniform as possible, the pilot will apply to Adult Fiction only.

**Libraries will be able to determine which new adult fiction items will receive local use codes, whether it is no copy, their only copy or a mix of copies (some local and some any hold). Libraries may choose to remove items from local use only sooner than 60 days.*

Item Loan Type (this will be presented to the Circulation Services Subcommittee on June 28 for final review)

Code: BKALH14

Loan period: 14 day loan period

Renewals: No renewals

Fines: Determined by library

Participation: All libraries are encouraged to participate in the pilot, but no library will be required to participate.

Start date: July 1, 2022

It is recommended that we change the proposed start date to July 1 (from June 15) in order to allow participating libraries to prepare for the change and also so that we can prepare staff to address questions from patrons.

A question was raised at the 5/17 meeting about the possibility of grouping libraries with branches to allow local holds to also fill holds at a library's branches. Some investigation has been done, and it may be possible, but we will not be able to set-up the Bibliovention Sandbox for testing this until after the 7.02 upgrade. Production is currently slated to be upgraded to 7.02 in August 2022.