

MHLS Directors Association

Business Meeting of Thursday, February 18, 2021

Action Item #2: Checkout Policy

Background: The Resource Sharing Advisory Committee (RSAC) is carefully reviewing resource sharing policies and procedures for clarity, relevance and improvement. As part of this review, it was noted that there is no policy to guide libraries in the checkout process.

Issue: A guiding checkout policy is needed to ensure materials are being properly circulated.

Recommendation: The RSAC recommends the following Checkout Policy:

CHECKOUT POLICY

- Libraries are responsible to only check out items to patron accounts that are valid and in good standing according to the Verified Account Policy (DA approved 110619).
- Libraries checking out items are responsible for verifying that the materials being checked out match the information displayed in Sierra and are in acceptable circulating condition.

**Note: What is "acceptable circulating condition"? That determination has to be made by each library. Once the policy is approved, the RSAC will draft a supporting checkout procedure to address items in questionable circulating condition.*

Status: Discussed at RSAC meeting January 21, 2021. Action Item at February 18, 2021 DA meeting.

Action item #3: Missing Components Procedure

Background: Member libraries have frequently complained about the current Missing and Damaged Components Procedure. The main complaint is that the library that erroneously checks in something with missing parts does not have to address the error.

Issue: Under the current policy, the library that erroneously checks in something with missing parts does not have to correct the error. Additionally, there is no way for the owning library to know where an item sitting in a library's problem basket waiting for the missing part to be returned is.

Recommendation: The RSAC recommends the follow procedure be following for Missing Components:

MISSING COMPONENTS PROCEDURE

Received from Patron (Book drop or Circ desk)

It is the responsibility of the receiving library to make sure all pieces noted in the item record as a pop-up message are included when an item is returned. If pieces listed in the

item record are missing, the item should not be checked in. The library that is receiving the item from the patron is required to attempt to recover the missing part(s). The patron shall be notified that same day alerting them the item they returned was incomplete and will not be checked in. If the missing components are not returned, the item will be billed to the patron. Once the item is billed, the item shall be returned to the owning library.

Received in Delivery Missing Parts

Items received in delivery that are missing parts should be returned to the library that set the item in-transit. This library can be identified in the "in-transit" message in the item record as the "from".

To return an item:

- Change the item status to "in repair".
- Transfer the patron hold to the bib record.
- Place an item level hold for the RETURNTO library* on the item. Be sure to change the pickup location to this same library.
- Add a pop-up message to the item record explaining the problem. For example: sent to Carmel missing the disc car-jb 082520
- Scan the item. It will be set in-transit back to the library that sent it.

*Records have been created for each library for this purpose. To find the right record, search for RETURNTO and the library's [three-letter code](#). For example: RETURNTOcar to return an item to Carmel. These records should only be used to return items to the sending library.

When the RETURNTO library receives the item, the library should:

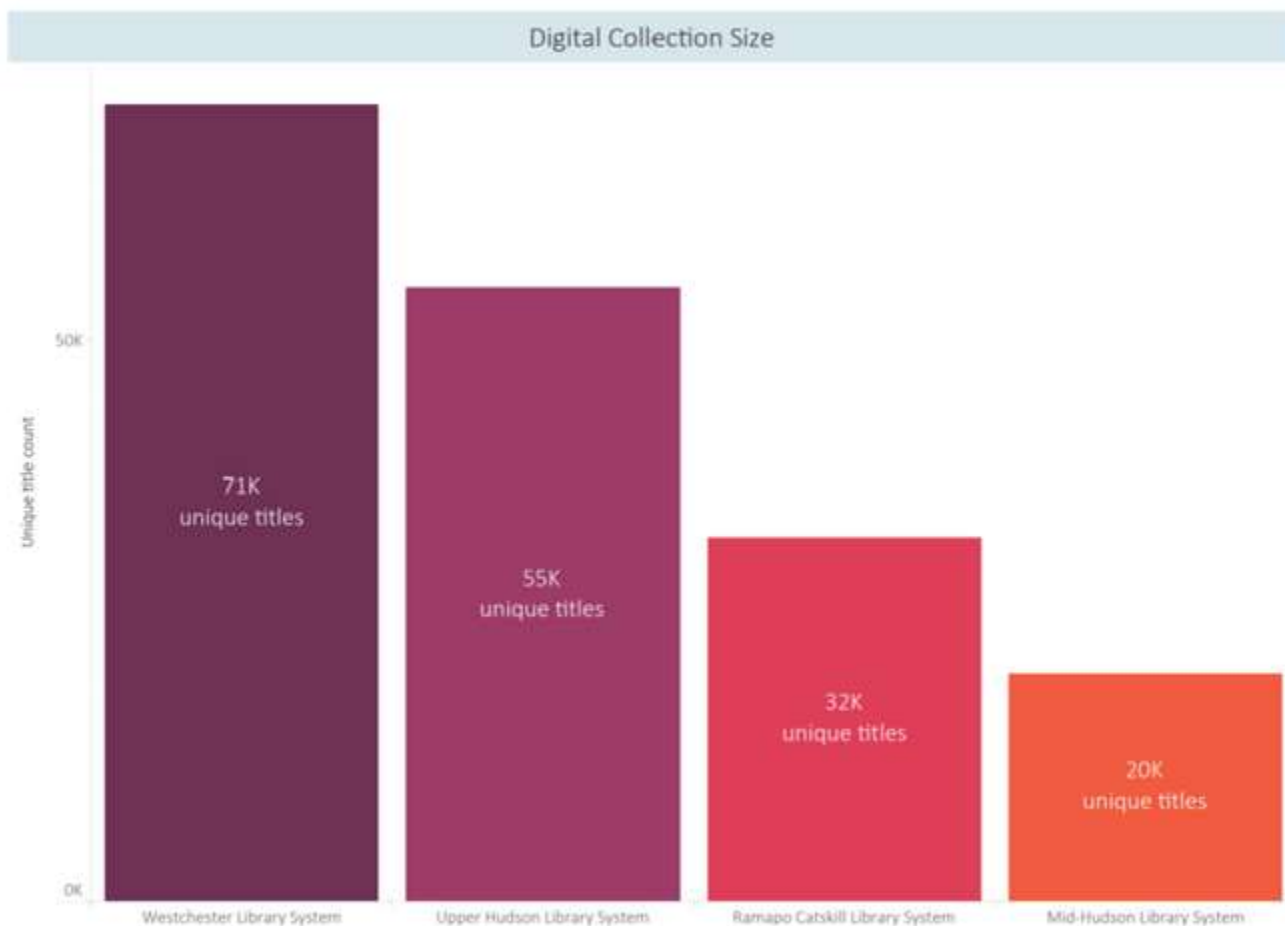
- Scan the item.
- Read the pop-up message and note why the item was returned.
- Note the last patron's information.
- Check the item out to the RETURNTO library. This will lead to the item eventually being billed to the library that erroneously checked-in the item if the missing component is not returned.
- Contact the last patron alerting them that the item they returned was incomplete and asking them to return the missing part.

Status: Discussed and tested throughout 2020 by RSAC. Action item at February 18, 2021 DA Business Meeting.

Action Item #4: OverDrive Reciprocal Lending Arrangement (RLA) Recommendation

Background: OverDrive offers a “Reciprocal Lending Arrangement” (RLA) to allow library systems to share their collections “across borders” with other library systems who have negotiated access terms with each other. The platforms of the other systems would remain separate from ours, available as an external link where our patrons might seek out additional content. Our patrons could access content through their platform and their patrons could access content through ours, however, content would be available based on negotiated terms related to access to metered access titles, cost per circ titles, and holds.

Issue: After the approval provided at the September 2020 DA Business Meeting, MHLS staff continued discussion with the Ramapo Catskill Library System (RCLS), Upper Hudson Library System (UHLS), and Westchester Library System (WLS) to explore the possibility of using RLA among our four systems. The fact-finding work for these discussions reveals that there is a significant amount of unique material that our patrons would gain access to in this agreement.



Recommendation: The Central Library/Collection Development Advisory Committee recommends MHLS proceed with an RLA with these four system with the following terms:

PREFERENCES FOR VISITORS

Below, please indicate your RLA group's preferred settings for visitors:

1. Allow visitors to place holds Yes No
2. Allow visitors to recommend titles for purchase Yes No
3. Allow visitors to borrow titles that are Metered Access by checkout Yes No
4. Allow visitors to borrow titles that are Metered Access by the earlier of time or checkout Yes No
5. Allow visitors to borrow titles in the Cost Per Circ lending model Yes No

Visitors will not have access to Simultaneous Use content (including Magazine subscriptions).

Status: Discussed at 8.21 CL/CD Advisory Committee; Action Item at September 9, 2020 DA Business Meeting.
Discussed at 1.21.2021 CL/CD Advisory Committee. Action Item at February 18, 2021 DA Business Meeting.