

**MID-HUDSON LIBRARY SYSTEM**  
**Resource Sharing Advisory Committee Meeting**

**Date:** May 7, 2024

**Location:** Online via Zoom

**Committee members attending:**

- Linda Holik (Columbia)
- Michelle Hoffman (Columbia)
- Carol Bancroft (Dutchess)
- Tom Lawrence (Dutchess)
- Julian Giarraputo (Greene)
- Jaki Elmo-Emel (Greene)
- Gina Loprinzo (Putnam)
- Donna Perolli (Putnam)
- Darren Lanspery (Ulster)
- Tracy Priest (Ulster)

**Staff Attending:** Laurie Shedrick, Vice-Chairperson (MHLS); Rebekkah Smith Aldrich (MHLS)

10:00 call to order

Identify Secretary: Linda Holik

Minutes from [March 7, 2024 meeting](#) reviewed and approved by Carol Bancroft seconded by Donna Perolli. Approved unanimously

**Discussion Items:**

**1) Review ILL Policy:**

**1. ILL Loan**

Original text:

- **If the item is not available in the OPAC/Sierra**, member library staff should first check [SEAL](#) (*the regional database of catalogs from academic, special, public and school libraries in Columbia, Dutchess, Greene, Orange, Putnam, Rockland, Sullivan, and Ulster counties*), and request the item through the SEAL interface.
- **If the item is not available in SEAL**, MHLS coordinates interlibrary loan services for members to borrow from nationwide collections through OCLC. Member library staff can send the request to MHLS ILL Department [through the ILL Module within Sierra](#) or [email](#). Note: If a journal title is not available in [Sierra](#), please also check the electronic journals on your county [eResources/HomeACCESS](#) page before sending in a request.
  - Before submitting an OCLC ILL request to MHLS:
    - the member library must check SEAL, as MHLS ILL will not request any item available in SEAL. SEAL requests are placed directly by the member library.

- the member library must check [Amazon](#) for the price of the item, because *(as per the MHLS Directors Association as of 10/1/11)* MHLS ILL cannot accept requests for any item **that can be purchased new** for under \$25.  
(this will be eliminated from the policy) Also note that *(as per the MHLS Directors Association as of 1/1/09)* MHLS ILL cannot accept requests for popular, readily available DVDs and music CDs. As of January 2015, the only DVDS MHLS ILL will lend or borrow through OCLC are non-fiction.

## 2. periods

- Be aware that any hold being sent to 'PATRN NAME: Mid-Hudson Library System-ILL-OCLC/ILL' is an out of area request, which will have an extended loan period in accordance with regional ILL lending procedures. **Move to section 2**

## 3. OCLC ILLs

- Any hold for 'Mid-Hudson Library System ILL-OCLC' is an out of area request and will have an extended loan period in accordance with regional ILL lending procedures.
- When an item that has been filled via OCLC by MHLS ILL Department becomes overdue, it is the prerogative of the owning/loaning library to determine whether or not to grant a renewal. It is the responsibility of the requesting library to notify MHLS ILL Department that a renewal is needed, before the due date. Items that become overdue may affect the ability of other MHLS libraries to borrow through OCLC.
- MHLS will bill each library for each OCLC loan filled for their patrons. It is acceptable that libraries who are not passing the fee on to their own patrons, to charge patrons from other libraries for the service. *As of September 1, 2007 this fee was suspended.*

## 4. Processing ALA form ILL requests for agencies outside of the MHLS or SEAL membership

- If the library receives an ALA request form from a library outside of the MHLS or Seal Membership the library can either ship the item at its own expense or contact the requesting agency and ask that the request be placed as an OCLC request, which will be processed by the MHLS ILL Department. *~Approved section by Directors Association 2/5/09*

### MHLS ILL (Text to include in RSAC Standards- Action item)

- If the item is not available in the OPAC/Sierra**, member library staff should first check [SEAL](#) *(the regional database of catalogs from academic, special, public and school libraries in Columbia, Dutchess, Greene, Orange, Putnam, Rockland, Sullivan, and Ulster counties)*, and request the item through the SEAL interface.

**If the item is not available in SEAL**, MHLS coordinates interlibrary loan services for members to borrow from nationwide collections through OCLC. Member library staff can send the request to MHLS ILL Department [through the ILL Module within Sierra](#) or [email](#). Note: If a journal title is not available in [Sierra](#), please also check the electronic journals on your county [eResources/HomeACCESS](#) page before sending in a

request.

Before submitting an OCLC ILL request to MHLS:

- Member library staff must check the Mid-Hudson Library System and SEAL catalogs. If a circulating copy can be borrowed from either of those collections, MHLS will not place an OCLC request.
- Member library staff must check Amazon to see if a new comparable item is available for under \$25. MHLS will not place an OCLC request if an item can be purchased for less than \$25, the average cost of an ILL transaction at book rates for shipping.

## 2) Review RS Standards: Delivery Review

- Delivery Procedures and Packaging Standards
  - Libraries should be sure to cross off previous destination on any handwritten routing slips
  - When handwriting routing slips, use bold, block lettering to write destination library
  - Remove language about returning bins, as new bins have been purchased.

### Delivery

Original text:

#### 1. Delivery Procedures and Packaging Standards

A. The Directors Association has approved [Delivery Procedures & Packaging Standards](#) . Libraries are expected to follow the delivery procedures that are described in the document. Items damaged in delivery using other, non-standard packaging will be the responsibility of the owning library. *~Approved by Directors Association 2/5/09*

- The committee reviewed the Delivery Procedures & Packaging which were updated by MHLS staff for currency. References to bin availability and cost were removed and the review was noted in the footer.-**Action item**

#### 2. Process Routing Slip (Updated Language - Action item)

- A. Libraries must use the MHLS default transit template in ILS, whenever possible.
- B. When a non-ILS routing slip is used, the delivery location must be printed in a large format at the top of the delivery slip and secured in the item.
- C. Do not use the location's 3 letter code .*~Amendment approved by Directors Association 2/7/07.*
- D. When using two-sided ILL routing slips, make sure the library name is crossed-off on the used side.
- E. Do not include patron personal information (ex: phone number).

## 3) MHLS Updates

- LX Starter Launch
- Patron Mobile App Launch

Meeting adjourned at 1:58

**To include in DA Business Meeting Agenda Attachment as an Action Items:**

**Action Item: Interlibrary Loan Policies**

**Background:** With more than a decade between the last revision of the ILL policies and procedures RSAC found few minor changes to the current procedures to make in their review of this section of the Resource Sharing Standards but the committee determined that the MHLS Polices should be incorporated rather than linked to provide staff with a concise understanding of the Policies and Procedures. In tandem with this review MHLS has reviewed the polices to ensure accuracy and currency.

**Issue:** The Policies for ILL needed to be brought into the current document formatting, with policy separated from procedure. Also, MHLS Policies were incorporated to provide a comprehensive understanding for staff in a single view.

**Recommendation:** Approve the following updates to the text for ILL.

**INTERLIBRARY LOAN**

**Policies:**

**1. OCLC ILLs**

- B. Any hold for 'Mid-Hudson Library System ILL-OCLC' is an out of area request and will have an extended loan period in accordance with regional ILL lending procedures.
- C. Be aware that any hold being sent to 'PATRN NAME: Mid-Hudson Library System-ILL-OCLC/ILL' is an out of area request, which will have an extended loan period in accordance with regional ILL lending procedures.
- D. When an item that has been filled via OCLC by MHLS ILL Department becomes overdue, it is the prerogative of the owning/loaning library to determine whether or not to grant a renewal. It is the responsibility of the requesting library to notify MHLS ILL Department that a renewal is needed, before the due date. Items that become overdue may affect the ability of other MHLS libraries to borrow through OCLC.
- E. MHLS will bill each library for each OCLC loan filled for their patrons where cost is incurred. It is acceptable that libraries who are not passing the fee on to their own patrons, charge patrons from other libraries for the service.  
**As of September 1, 2007 this fee was suspended.**
- F. Mid-Hudson ILL department will not place OCLC requests for the following material.
  - 1. A circulating copy can be borrowed from either of those collections.
  - 2. A comparable new edition can be purchased on Amazon for less than \$25.

2. Processing ALA form ILL requests for agencies outside of the MHLS or SEAL membership
  - A. If the library receives an ALA request form from a library outside of the MHLS or Seal Membership the library can either ship the item at its own expense or contact the requesting agency and ask that the request be placed as an OCLC request, which will be processed by the MHLS ILL Department. ~Approved section by Directors Association 2/5/09

**Procedures:**

1. Requesting material in SEAL should only be done when there are no circulating copies in the MHLS collection.
2. Requesting items from OCLC through Mid-Hudson ILL (also updated in MHLS Policies)
  - A. Before submitting an OCLC ILL request to MHLS:
    - Member library staff must check the Mid-Hudson Library System and SEAL catalogs. If a circulating copy can be borrowed from either of those collections, MHLS will not place an OCLC request.
    - Member library staff must check Amazon to see if a new comparable item is available for under \$25. MHLS will not place an OCLC request if an item can be purchased for less than \$25, the average cost of an ILL transaction at book rates for shipping.

**Status:** Discussed at RSAC May 7, 2024

**Effective Date:** Upon approval

**Action Item #3: Delivery RS standards review**

**Background:** As part of the ongoing review of the Resource Sharing Standards, RSAC reviewed the section on delivery. It had not been reviewed for update since 2009

**Issue:** Like other areas format is addressed separating policy and procedure. Removed link to ILL form for use in place of ILS routing slip. It is not designed for library to library routing.

Note: Part 1.A of this section of the Standards refers back to the MHLS **Delivery Procedures and Packaging Standards**. As this was previously issued as a standalone document, that document review is included in a separate Action item.

**Recommendation:** Approve the following revised language for this section of the RS Standards.

**Delivery**

**Policies**

3. The Directors Association has approved [Delivery Procedures & Packaging Standards](#) . Libraries are expected to follow the delivery procedures that are described in the document. Items damaged in delivery using other, non-standard packaging will be the responsibility of the owning library. ~Approved by Directors Association 2/5/09

#### 4. Routing

- A. Libraries must use the MHLS default transit template in ILS, whenever possible.
- B. When a non-ILS routing slip is used, the delivery location must be printed in a large format at the top of the delivery slip and secured in the item.
- C. A library's 3 letter code may not be used on a routing slip. *~Amendment approved by Directors Association 2/7/07.*
- D. When using two-sided ILL routing slips, make sure the library name is crossed-off on the used side.
- E. A routing slip may not include patron personal information (ex: phone number).

**Status:** Discussed at the RSAC meeting on May 7th

**Effective Date:** Upon Approval

#### **Action Item #4:**

**Background:** In tandem with approving the RS Standards for Delivery, MHLS Staff reviewed the Delivery Procedures and Packaging Standards document for currency and accuracy.

**Issue:** Minor changes required.

- Remove *"All boxes must be returned to MHLS. You will be supplied empty boxes by the delivery staff. These boxes are in short supply and in high demand."* As new bins have been purchased
- Added Non Bin form link and modified language in non bin Bullet

**Recommendation:**

[Review the attached document](https://midhudson.org/wp-content/uploads/2013/02/Delivery-Standards.pdf) for approval to replace the previous version found at <https://midhudson.org/wp-content/uploads/2013/02/Delivery-Standards.pdf>