

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

**Date:** August 8, 2024

**Location:**

**Committee members attending:**

- Unfilled (Columbia)
- Michelle Hoffman (Columbia)
- Carol Bancroft (Dutchess)
- Tom Lawrence (Dutchess)
- Kim Benjamin (Greene)

- Jaki Elmo-Emel (Greene)
- Gina Loprinzo (Putnam)
- Donna Perolli (Putnam)
- Darren Lanspery (Ulster)
- Tracy Priest (Ulster)

**Staff Attending:** Laurie Shedrick (MHLS)

**Others Attending:**

**Discussion Items:**

- 1) Call to order 10:00
- 2) Identify Secretary - Jackie Elmo-Emel
- 3) Approve [minutes from May 7, 2024 meeting](#) Carol Bancroft Motioned – Second by Michelle Hoffman  
Approved
- 4) Need for Columbia County Rep to replace Linda Holik  
CCLA meets tomorrow – Michelle Hoffman will take this to the county meeting on 8/9
- 5) The committee discussed the revision of the Regional Interlibrary Loan Policies as submitted by SENYLRC and provided in advance of the meeting along with a summary of changes. The committee would like to better understand the definitions around accessibility, which Laurie will provide before the Directors meet on September 12<sup>th</sup>.  
A motion to accept the Regional Interlibrary Loan Policies as presented was made by Jackie Elmo-Emel, seconded by Donna Perolli. Approved by the committee to be included as an action item for the 9/12 DA.
- 6) Review of the upgraded courtesy notices via LX Starter: Some suggestions were for more concise language, bold fonts to highlight key points. Some changes were made during the meeting.

**Current**

[login to your library account](#)

Hello!

This is a reminder that you have some items that are due back in a few days. If the items are able to be extended, you will see a new due date below. In some cases, it may not be possible to extend the loan. Those items will still be due back and show the original due date below. You can see all of your checked out items and the due dates by logging into your library account, using the link above. If you have questions, please reach out to your local library.

## Revision

[insert MHLS Logo]

This is a reminder that you have items due back in three days.

Items eligible for renewal have been extended and show a new due date below.

Review the items below or login to your library account for more detail.

If you have questions, please contact your local library.

[Login to your library account](#)    [Contact your local Library](#)

- 7) Discussion on expired holds and clearing holdshelf. While we have no policy that explicitly lists clearing the holdshelf, but we do have language on having to move through the system within the 7-business day window. We are adding a statement to policy to take more proactive steps, in order to avoid risking non-compliance A

## Holds

### 1. Bibliographic and Item Level Holds

A. Libraries must use bibliographic level holds (hold copy returned soonest) and not item level holds for faster service, except where serials volumes exist. ~Approved by Directors Association 3/26/06.

### 2. Limits on System Hold

A. In the OPAC, the patron is limited to placing 50 holds. A library staff member can override this on a case-by-case basis. ~Approved by Directors Association 1/5/2012.

### 3. Awaiting pickup

A. Items remain in "awaiting pickup" status for no longer than 7 business days (open days for individual libraries).

### 4. Rerouting Holds after put In Transit

A. Items that are in transit to fill a hold cannot be rerouted. Only exception is when patron has made an error in choosing their pickup agency.

### 5. Multiple Holds on Bib Record:

A. Only one hold can be placed by or for a patron on any single Bibliographic record unless that patron is administering a book discussion. For book discussions the override option can be used.

Policy: All member libraries are required to run the clear the hold shelf function each day that they are open. Items that are cleared must be checked in immediately and processed accordingly.

- 8) Discussion: Discussion: Standard regarding blocking children whose parents owe fines from borrowing materials. Local preference vs. system-wide policy. Hard to determine, but overall children should not be penalized for parents' misuse. Consider how ethical this is. Is there any standard set by ALA? How can messaging / notes within patron account be more effective- reiterate that it's critical to communicate who is creating the message, dating the message, and keeping the message current.

Related to this:

- Local policies for lending are not transferred to other locations  
Examples:  
Local policy Threshold for borrowing  
New patrons limits
- Messages/Notes should clearly indicate a location initials and date  
Clearing notes/messages when resolved

- 9) Update on Brewster new Tools iType: refining how we define and use existing loan rules, and how we can organize holds to eligible patrons. Positive overall. Some items might use booking opposed to checked out, so that items checkout would be scheduled. But this would mean holds could not be applied. Local pickup

might be applicable to museum passes or large equipment.

10) Word change ideas in Discover to add to the discussion.

Changing word "Holds" in the My Bookshelf tab to "Requests" to put it in line with the "Request it" button at placement. Committee didn't see the need to change and cited "holds" is also used in Libby.

11) Upgrades/modifications/problems with Discover

Laurie was asked to give the committee a full report on where we are with Discover enhancement requests. The only outstanding request submitted in February that remains outstanding and likely will not be included anytime soon is the location information for the "On order " indicator. Laurie Reviewed recent feedback, feedback form updates. At the launch, we were receiving more feedback , but we have been receiving less feedback over time, suggesting patron perception and experience are improving. More record detail is a consistent suggestion / request. Laurie continues to advocate and communicate this new & evolving software.

12) MHLS Updates

- LX Starter is being rolled out now. 15 member libraries have been trained and 5 have now published. New Libraries are welcome to join at any time.
- Discover Custom catalog Collection sites and Kiosks are available. Training is required for access and can be scheduled with an email to techsupport
- The Mobile App is getting closer. MHLS has the first pilot library (PPLD) nearly ready to launch. We will shortly test, and then make the app available in the app stores.

Adjourned 12:08

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

**Action Item #1: Approval of the Regional Interlibrary Loan Code**

**Background:** South Eastern Library System(SENYLRC) regularly reviews and adopts a regional policy for ILL and asks the governing members to approve it. Recently ALA has updated their version of the code which is the template used for our regional code. Local exceptions are included to temper the code to our local needs. Once approved and accepted by the governing members this code is also used as a guideline. As a governing member of SENYLRC, MHLS has traditionally asked the Directors to review and approve the code. The Resource Sharing Committee has reviewed and voted to approve the code and has submitted it for approval by the DA. A copy of the revised code has been provided in the DA Packet.

**Issue:** ALA has revised the Inter Library Loan code. South Eastern Library Resources Council has presented a revised regional code for adoption.

**Recommendation:** The Resource Sharing Committee recommends that Mid-Hudson Library System adopt the revised regional code and that the Directors Association vote to support the adoption of the code as presented by SENYLRC

**Status:** Discussed at the RSAC meeting of August 8, 2024

**Effective Date:** TBD by the full membership vote of the SENYLRC governing member vote.

### **Action Item #2: Courtesy notices review and update**

**Background:** A courtesy notice notifies patrons that items are soon due and if the items are eligible for renewal, the patron is notified of the extension of the due date or reminded of the yet standing due date. Currently the notice is sent at the system level for all libraries 3 days before items are due. The notice centrally eliminates multiple courtesy notices to patrons who have items that are owned by many libraries.

**Issue:** We are currently not able to update the central notice LX Starter, but with libraries now sending these notices, the state of the current notice by comparison begs an update. The committee reviewed the current notice and recommended a more distilled version of the text, an include of a logo in the header and links to both the catalog and a listing of member libraries for contact.

**Recommendation:** The RSAC recommends updating the current courtesy notice with the revised text below.

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**Status:** Discussed at the RSAC meeting of August 8, 2024

**Effective Date:** Soon after approval

### **Action Item #3: Required daily clearing of holdsheld**

**Background:** Clearing the holdshelf is a necessary function within the Sierra holds and notification

processes. While the policy currently includes that items remain on the holdshelf for a maximum of 7 business days, there is no policy that requires the process of clearing those holds and checking them in.

**Issue:** Libraries who do not clear the holdshelf are creating circulation service issues for all libraries.

- Clearing the holdshelf maintains the holds tables, which allows the notices to be prepared for hold pickup notices. **Not clearing the holdshelf can result in an incomplete list of notices.** Library staff will notice more items going on the holdshelf than notices being prepared. If the staff notice the discrepancy they must then call or email the patrons manually.
- Items longer than 7 days on the holdshelf are not available to fill holds for others and are detained from being available in local collections.
- Currently, there is no policy mandating this process.

**Recommendation:** Update the following policy with an additional entry following 3A

3 B. All member libraries are required to run the clear the hold shelf function each day that they are open. Items that are cleared must be checked in immediately and processed accordingly.

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**Status:** Discussed at the RSAC meeting of August 8, 2024

**Effective Date:** Upon Approval