

## **NEOS Access Services Committee Minutes**

**Thursday, June 12, 2014**

### **Professors Emeriti Room, Cameron Library**

Present: Chair, Bonita Bjornson (King's), Karen Hildebrandt (Concordia), Wilmer Tenerife (Canadian), Donna Gordon (AHS), Nick Ursulak (MacEwan), Roger Salus (Covenant), Peggy Morgan (U of A ITS), Marg Sheppard (NorQuest), Lilla Lesko (U of A), Anne Carr-Wiggin (NEOS)

Teleconference: Peggy McKenzie & Lyndsay van der Hoek (Olds), Laura Lemmens (AGL), Corinne Hope (Keyano), Barbara Mahoney (RDC), Kathy Hendry (GPRC), Sheila Heit (Lakeland)

1. Bonita called the meeting to order at 9:35 am.
2. Minutes from the January 30, 2014 meeting were approved.
3. TAL Resource Sharing Policy and Implications for NEOS – Anne and Peggy.  
Anne provided background (attached) on changes to the TAL Resource Sharing Policy and discussions at the NEOS Directors' meeting.  
Peggy provided documentation related to implementation of the necessary changes, and discussion was held around several areas with a view to operationalizing the changes.

At the TAL Board Meeting on April 14, members approved a new Resource Sharing Policy which has implications for NEOS policies. The changes affect how TAL member libraries lend to the clients of fellow TAL member libraries within NEOS (Secondary Clients) as well as TAL Card holders from TAL member libraries outside of NEOS.

The new TAL policy says:

2. TAL Card holders shall have borrowing privileges equivalent to local users except where prohibited by licensing agreements. The host library will determine user type equivalences (e.g. public library adult user = undergraduate student).
3. TAL Card holders must abide by host library lending rules.
4. TAL Card holders will not be charged a fee for borrowing materials.

Giving TAL Card holders Primary Client-level loans of longer than two weeks raised concerns relating to recalls and very long loans at libraries such as Alberta Government Library and the University of Alberta, which have loans for the most restricted level of primary client of six weeks and more.

**It was decided at the Directors' meeting that the best approach for NEOS was to define "local user" for the purposes of the TAL Resource Sharing Policy as a Secondary Client, as defined in the Policy on Basic Services and the Policy on Sharing Materials. This will provide a higher level of**

access for TAL Card holders (unlimited items on loan at a time, and more formats available for loan) while providing more consistency in TAL Card privileges across NEOS.

Directors also agreed to establish a single TAL Card profile for use in all NEOS libraries that are TAL members. This would mean that if a person set up a TAL Card profile at one NEOS member library he/she could borrow and place holds on materials in all other NEOS libraries that are TAL members. This would be more convenient for the client and would also mean that clients could not get multiple TAL Card profiles and amass fines on all of them. The profile would be attached to the NEOS Free eResources library.

The NEOS Access Services Committee reviewed the information and discussed approaches to implementing the changes.

The committee decided that TAL Card holders would be blocked when they have one item overdue. There may be instances where staff may consider an exception or an override. For example clients may say they have returned items in a bookdrop or to another TAL member library and they have not made it back to the owning library. Staff can assess the situation and offer an extra renewal where appropriate. We will monitor to see if this change causes problems.

It was also decided that loans would not be allowed on Reserve items or items booked via Materials Booking.

## **Implementation of the Changes**

Implementation to take place by Sept 1, 2014

### **New TAL Policy:**

NEOS-TAL will have the same library privileges as existing secondary users at your library

- can borrow the same item types
- can place holds on the same item types

### **TAL user profile (proposed):**

Name: NEOS-TAL

Description: NEOS The Alberta Library

Billable: yes

Privilege limit: 12 months

Privilege fee: \$0

Charge limit: unlimited

**Materials booking and Reserves will be non-loanable.**

Circ rule for most item formats: 2WK-100-3R (2 weeks, \$1.00/day fine, 3 renewals); no recalls.

**Registration Process:**

- Before registering, search for patron by name to ensure that the patron is not already registered. The patron should have only one NEOS-TAL record in Workflows.
- when registering:
  - Profile name: NEOS-TAL
  - Library : NEOS\_FREE
  - privilege expires: not to exceed one year (date on their TAL card or one year from current date, whichever is soonest)
  - demographics: user cat 4 – select your own library group (This will enable us to determine which library the person signed up at, for statistical purposes.)
- all other registration details remain the same

**Threshold considerations:**

Currently, TAL user profiles have:

- an Overdue threshold of 25,000 (the number of overdue items a user is allowed before a user is blocked from further checkouts). The committee agreed that the patron record would be blocked as soon as they have one item overdue.
- a Bill Threshold of \$50.00 (the amount of bills and accruing fines allowed before a user is blocked from further checkouts.) This is consistent with our Primary and Secondary borrower profiles.

**Changes to Workflows Configuration (Peggy's tasks):**

- Create new user profile and user cat4s
- Modify existing TAL records in bulk (there are over 2000 TAL users within NEOS) – change user profile and library; add user cat4s
- Jim Hamilton will run a report to bulk change the TAL records to the new profile for all those with unique profiles.
- Consolidate duplicate user records if both are active (approximately 150 users have more than one TAL user record in Symphony, e.g. UA-TAL and MAC-TAL). The consolidation of duplicate records have to be done manually. Peggy will send lists to the home libraries and each library would update their TAL patron profiles. Bonita and Peggy will work out a process/procedure and send it out to the group for consolidating the profiles.
- circ map:
  - remove mapping for old TAL profiles;
  - add mapping to prevent the new TAL profile from borrowing at non-TAL libraries (AHS, AITF, Covenant, Newman & Vanguard are not TAL members).
- hold map:
  - remove mapping for old TAL profiles

- shadow or remove old TAL profiles except for those with bills attached. Those with bills will be moved to the new profile.
  - determine how to handle expired TAL user records
4. **Claims Returned Report** – Peggy recommended that the Claims Returned Report be run monthly rather than yearly. When items are marked Claims Returned this remains on the patron record until manually removed. If item is marked Claims Returned before the due date it will never incur late fines or lost item status. If marked Claims Returned after the due date then fines and lost book fees are added. With a move to a monthly report it will be easier to monitor Claims Returned and ensure that items are marked missing and that the note is removed from the patron record after a suitable length of time. Peggy will send out an email once the change to this report has been done.
  5. **Government Courier.** There was some discussion of items returned via government courier to libraries that are non-courier libraries and how these items have ended up on the closest government location for several months before the owning library has been contacted. Unfortunately there isn't much we can do except try to encourage libraries to return items as quickly as possible and to check if a library is served by the courier system. TAL Card holders can return items borrowed via the TAL Card to any participating TAL Card library. TAL Card holders can choose a pickup location within NEOS that is not a TAL member library. Normally they should not return items they borrowed from libraries other than NEOS libraries to that location. However, if this should happen, those libraries will return the items to the owning library outside of NEOS.
  6. Meeting Adjourned at 11:05 am

Next meeting: TBA

## **NEOS Directors' Meeting, May 23, 2014 - Backgrounder: New TAL Resource Sharing Policy**

### **New TAL Resource Sharing Policy - Implications for NEOS**

At the TAL Board Meeting on April 14 a new Resource Sharing Policy was passed by members.

The section dealing with the TAL Card in particular has implications for NEOS policy and the NEOS Executive believes that it would be useful to discuss the new TAL policy so that NEOS policy changes can be made consistently where necessary, to minimize client and staff confusion. Executive is suggesting an initial discussion at the NEOS Directors' meeting with possibly an invitation for Clive Maishment to attend the next NEOS Executive meeting. We understand from Eve that communications from TAL are being prepared, and may be received by the NEOS Directors' meeting. (NEOS Directors were intending to review two policies with a view to administrative changes, but the new TAL policy suggests more significant changes may be needed.)

The new TAL policy says:

2. TAL Card holders shall have borrowing privileges equivalent to local users except where prohibited by licensing agreements. The host library will determine user type equivalences (e.g. public library adult user = undergraduate student).
3. TAL Card holders must abide by host library lending rules.
4. TAL Card holders will not be charged a fee for borrowing materials.

Some considerations:

- The TAL policy refers to TAL Card holders, but for the NEOS members who are TAL members, the mechanism for sharing materials with fellow TAL members is not the TAL Card but the Secondary Client provisions of the NEOS Policy on Basic Services and Policy on Sharing Materials, so the implication may be that these provisions also need to be changed to conform with the TAL policy. Although the TAL policy only speaks of TAL Card clients, the assumption is likely that where TAL member libraries use other mechanisms for sharing, clients shouldn't get a lower level of access than TAL Card clients. Otherwise, we may see NEOS secondary clients getting TAL Cards where they would allow for more access than secondary client cards.
- Secondary client borrowing privileges are currently two week loans, three renewals, fines of \$1 a day, unlimited items in most formats and most "locations" able to be borrowed. These are consistent for all NEOS clients borrowing outside their home library.
- Primary client (local user) borrowing privileges vary widely across NEOS. All libraries allow most collections and most formats to be borrowed by their primary clients. Loan periods, renewals and fines vary however, from two weeks to six weeks for undergraduates; unlimited loans for some staff members; and fines from no fines to \$2 or \$5 a day.
- Libraries that offer their undergraduates or staff more than a two week loan usually make the items recallable, with the client having seven days to return the item, and incurring a blocked account and up to \$5 a day in late fees if the item is overdue. TAL Card loans may be returned at any TAL Card participating library, so the implications of delays in return need to be considered.

- Currently the privileges offered to TAL Card clients vary across the consortium. Most NEOS members which are also TAL members offer TAL clients a loan of five items at one time (4 libraries, including the UA, offer 10 at a time). Item formats loaned vary widely among libraries (UA and RDC libraries offer the widest variety at 9 item types. Other libraries vary between 1 and 6 item types - the average is 3-5). Renewal limits vary between 0 and 4 (the average renewal limit is 1-2). The hold map has been configured so that TAL cardholders are only able to place holds on items at their registering library (or library group). In a few cases, TAL cardholders can borrow certain item types but not place holds on them (e.g. UA-TAL can borrow item type SHORT\_LOAN but cannot place holds on those items).
- Some libraries charge a fee to non-primary clients for interlibrary loan or other services.
- Five NEOS members are not TAL members.
- The TAL policy would not require libraries to offer other External clients (e.g. alumni) the same borrowing privileges as local users.
- Is there flexibility in how NEOS defines “local users?”