

NEOS Access Services Committee Meeting

November 16, 2021

Via Video Call

Minutes

Attending: Samantha Nugent (NorQuest College) (Chair), Roberto Pellegrino (Alberta Innovates), Melanie Belliveau (Alberta Health Services), Wilmer Tenerife (Burman University), Debbie Quast (Concordia University of Edmonton), Tara Sommerfeld-Gladue (Covenant Health), Eden Murray-Black (Grande Prairie Regional College), Bonita Bjornson (King's University), Kathy Williams (Lakeland College), Trish Hurlbert (MacEwan University), Jim Derksen (Newman Theological College), Kaitlin Kirk (Northern Lakes College), Barbara Mahoney (Red Deer Polytechnic), Natalya Brettle (University of Alberta), Cayla Thorlakson (Vanguard College), Scott Davies (University of Alberta ITS), Anne Carr-Wiggin (NEOS)

Regrets: Jon Newman (Olds College), Elaine Coupland (University of Alberta ITS)

1. The agenda was approved by consensus
2. The minutes of the meeting of October 5, 2021 were approved by consensus.
3. Carried over from August and October meetings : Reconsideration of earlier discussion about increasing secondary client loan periods - [Results of original survey](#).

Members consulted within their libraries and a further discussion was held at this meeting. It was generally agreed that a four week loan period and three renewals would be acceptable, with no recall fines but blocking of accounts for overdue items. It was decided to investigate further the implications of recalls once the loan period had been extended. Bonita, Natalya, Scott, Anne and Samantha formed a small group for this purpose. Members will also consult within their institutions about extending loan periods to Secondary clients on items other than print books. Details of the issue and discussion are below.

**FYI - implementation timing note from U of A ILS Team: There is no capacity to work on the systems side of this until sometime in 2022.*

History and Discussion:

- Issues: Loan period for primaries may be shorter than secondary client.
- Recall and overdue fines.
- Would need to agree on a shared/common recall fine.
- Recommendation will need to go to Directors for approval.

- This initiative excludes externals.
- Users are blocked when they have an overdue recall.

Results of October Survey:

- 9 responses (as of Nov 16, 12:00pm)
- About half of all NEOS libraries have shorter than 4 weeks as their standard loan period for books for their primaries
 - 3 libraries currently have 2 week loans for their primary borrowers (books)
Burman, Keyano, Northern Lakes
 - 5 libraries have 3 week loans for their primary borrowers (books)
Norquest, Grande Prairie, AHS, Vanguard, Newman
- **“If NEOS libraries decide to increase the loan period for secondary borrowers, how long should it be for print items”**
 - 77.8% of respondents said 4 weeks
 - 22.2% of respondents said 3 weeks
- Comments:
 - UAlberta would prefer term loans, but since that's not possible for all NEOS libraries 4 weeks would be our next choice.
 - Our primary borrowers only get 3 week loans, and we would prefer not to lend to secondary borrowers for longer than our primary borrowers.
 - We do not want our primary users to have a shorter loan period than secondary users.
 - We are happy to extend our primary clients' borrowing period to match secondary borrowers
- **Comments from the Meeting**
 - Each library can choose their preferred loan period for their primary borrowers
 - If you prefer to retain a shorter than 4 week loan period for your primary borrowers you could grant your primaries a higher number of renewals
 - We do have to agree as a consortium about the secondary borrowers – the system dictates that this loan period must be consistent across the consortium

- Covenant – is fine with extending the loan period for secondaries
- AHS – fine with secondaries going to 4 weeks
- Red Deer – fine with secondaries going to 4 weeks
- NTC – not opposed to the 4 week loan
- Burman – not opposed to the 4 week loan period
- NLC – fine with the 4 week loan period
- Vanguard – fine with 3 or 4 weeks for loan period
- **“Should loan periods for other item types be extended?”**
- Comments:
 - No
 - The only other item type we really use is local loan for DVDs, which can't be requested by other libraries (no opinion)
 - Yes. Consistency would be helpful
 - Yes - UAlberta loans almost all material with the same, consistent loan period (term loan), so we would prefer to see the same (eg. consistent loan period of 3 or 4 weeks) with media from other NEOS locations if possible.
- **Comments from the Meeting**
 - Take this item back to our teams and discuss the possibility of extending loan periods on other types of items aside from print
 - Take a look at your circ maps
- **“How many renewals should there be for print items? (Renewals for other items vary.)”**
 - 66.7% of respondents said 4
 - 22.2% of respondents said 2
 - 11.1% of respondents said 3
- Comments on renewals:
 - If a loan period of 4 weeks is settled on, we would prefer to make a maximum of 3 renewals available. We are not comfortable loaning our books

out to secondary borrowers for longer than a semester (12 weeks total borrowing time).

- Three would also be acceptable
- “If loan periods for secondary borrowers are longer than two weeks this has implications for recalls. Currently there are no recalls on loans to secondary borrowers; the item is simply not renewable. Items with extended loan periods are recallable. If loan periods for secondary borrowers are extended, then these items would be recallable.
- **Comments from the Meeting**
 - Most locations agree on 3 renewals
 - Red Deer fine with 4 renewals
 - Vanguard – more comfortable with fewer renewals if we are switching secondaries to 4 week loan period - but will go with 4 renewals if that is the consensus
- **How long should borrowers have an item before it is recalled (borrowers would still have seven days to return the recalled item)?”**
 - 100% of respondents said 1 week
- **Comments from the Meeting**
 - Do we want a recall to equal a 2 week loan if we are switching everybody who is eligible for recalls to a minimum of a 4 week loan?
 - Some recalls will still require travel time – we don’t want patrons waiting longer than they have to.
 - **Scott:** It is possible to change the time frame of the recall.
 - Is there a BCA report that would tell us which items are being recalled on a regular basis – identify items with multiple recalls / holds?
 - Frequent recalls
 - Frequent checkouts
 - Frequent holds on items being brought in from other libraries
 - Frequent holds on items being sent out from home library

- Bonita, Natalya, Scott, Anne, Samantha will look into the implications of recalls and the different stages at which recalls can be made, how often are they happening.

- **How much should the recall fine for secondary borrowers be per day?**

- “Currently most NEOS libraries have recall fines between \$0.25 and \$1.00 per day for their primary users. Concordia* and King's fine \$2.00 per day. How much should the recall fine for secondary borrowers be per day?” [**Concordia has since eliminated recall fines*]

- 66.7% of respondents said Account block only (no fine)
- 33.3% of respondents said \$1 per day

- **Comments from the Meeting**

- Blocking with no fines seems to be the consensus
- Blocking is more effective than fines – restricting access
- No fines mean there is no need for the exchange for money
- Covenant – no recall fines, blocking only
- AHS – no recall fines
- Red Deer – not sure about fines for recalls

4. Revisiting decision to move Sept. 30 term loan due date – **Scott**

- Moving the term loan forward to Oct 1 will cause an issue so we will have to set the due date to Sept 29. As a reminder, this is regarding the implementation of the National Day for Truth and Reconciliation, now falling on Sep 30th each year

5. NEOS Connect Holiday Closure - **Natalya**

The last day for delivery/pick up is Dec 20, 2022
NEOS Connect resumes Jan 4, 2022

6. Date of next meeting?

Tuesday, Feb 8, 2022, 1:00pm