

**NEOS Access Services Committee Meeting  
Cameron Library  
Nov. 8, 2016  
Minutes**

**In Attendance:** Karina Dunn (Vanguard), Bonita Bjornson (Kings), Peggy Morgan (UofA ITS), Anne Carr-Wiggin (NEOS), Roger Salus (Covenant Health), Mary Sheppard (NorQuest), Donna Gordon (AHS), Laura Lemmens (AB Gov't Library), CJ de Jong (UofA), Lana Thompson (MacEwan)

**Teleconference:** Corinne Hope (Keyano), Brenda Zimmerman (GPRC), Barbara Mahoney (RDC), Wilmer Tenerife (Burman), Lyndsay van de Hoek (Olds), Roberto Pellegrino (AITF).

1. Call to Order/Welcome/Additions to Agenda: **10:05AM**
2. Approval to Draft Previous Meeting Minutes: **Approved by consensus**

**3. Full barcode on desk receipts – CJ De Jong**

*University of Alberta staff noticed the full name and barcode listed on the checkout receipts and had a concern about privacy. Since it is an either/or situation (no way to do partial information or blackout portions) would it be okay for Peggy to change the default receipts across NEOS to not include this information? **Approved by consensus.***

*Many of the other libraries already customized their receipt printers to not include this information. Each library's customization will override the default change (note: customization has to be done on each individual workstation!). **No objections or concerns raised.***

**4. Potential length of Loan Periods- Primary & Secondary Borrowers – Anne Carr-Wiggin**

*At the last meeting Access Services Committee members discussed increasing the length of loans to Secondary Clients.*

*Some considerations:*

- *External Clients/TAL Card holders have the same level of privilege as Secondary Borrowers (stemmed from TAL members' agreement to give them the same privileges as primary borrowers but TAL is OK with this compromise).*
- *Some libraries may need to consider increase borrowing to their own primary clients*
- *Annual Assessments are partially calculated on checkouts (and a longer loan period would mean fewer checkouts)*
- *Loans longer than 2 weeks are subject to RECALL, which may be an issue when more items have to be returned from other libraries and may result in client issues.*

*Although some libraries supported increasing the length of loans, there were enough concerns expressed that the committee decided not to go ahead at this time with further investigation.*

*Some concerns were:*

- *Loans to primary clients of 4 weeks working well; renewals have gone down to 10% of checkouts.*
- *Recent increase to renewals PLUS a longer checkout period means a longer time to receive materials in transit for hold requests. Most students want material today, not in a week from now.*
- *Concern with resources being gone so long, possibly an entire semester with renewals.*
- *Longer loan periods mean more time for clients to lose track, forget what is checked out, as well as their transient population might never bring things back.*
- *Concerns with RECALLs which can be a difficult education point with clients.*

- *Students find material by browsing the shelves. They write their papers with the books they find on the shelves - not really using the catalog and holds to its full potential. If that experience was improved, and checked out books were more 'findable' when searching, we could perhaps see it working for us.*
- *Maybe discuss the number of renewals and bring it back down from 4?*

*Peggy noted that the loan period is automatically shortened when there is an outstanding hold request on the item (to two weeks).*

*The group also considered a potential auto-renewal feature? It would be a lot of work, much to be considered, investigation required. IT would have to run reports and change due dates (not just a Sirsi feature we can 'turn on').*

*- CJ and Laura will look into this further (find other libraries that have done it, etc).*

*One library noted that fines are an incentive to get material back.*

*Some libraries don't charge fines but do have the \$150 lost book charge at 31 days overdue.*

## **5. Potential impact of longer loan periods on Recalls – Peggy Morgan**

*If/When we revisit the longer loan periods - here are some considerations to take into account:*

- *Current circulation mapping has different libraries lending different item types to secondary clients - libraries would have to decide whether longer loan periods would apply to all item types or only to item types such as BOOK. Libraries would also have to decide whether the current fine rate (\$1.00/day) and renewal limit (4) would remain.*
- *Concern with external and TAL borrowers because their email addresses are not always reliable and delivery of recall notices cannot be guaranteed*
- *Process Reminder: When a hold is placed, the system checks first to see if there is an available, holdable, ON\_SHELF item. If so, then that copy is selected to fill the hold. If not, then the system checks for items with loan periods greater than two weeks. These items are recallable after the user has had the item for seven days. Users then have an additional seven days to return the item.*
- *Recall notices are sent if the recall due date is earlier than the original due date. Recall notices are not sent for items that are due in less than seven days or for items that are overdue.*
- *FYI: IF another copy gets returned and fills the hold, it doesn't cancel the RECALL but if a hold is cancelled, the recall is cancelled and the original due date is reinstated.*

## **6. Fines Policy Changes across NEOS – Anne Carr-Wiggin**

*Each library can do what they want with their primary borrowers in terms of fines, loan periods etc. but secondary borrowers (NEOS clients at a library other than their home library), External, TAL, must be decided with NEOS-wide agreement.*

## **7. Limit to NEOS-TAL borrowing limits- Lana Thompson**

*MacEwan is proposing a limit be set on the number of items TAL and External clients can borrow.*

*Some considerations:*

- *TAL just needs to see "reasonable" level of access*
- *Currently NEOS External/TAL borrowers: only 11 with more than 30 checked out; 17 with more than 25; and 22 with more than 20 - of those only one has an overdue.*
- *TAL/External clients are Blocked at one overdue/ unable to renew*

- *Red Deer Public has a max of 50 items for primary clients; EPL has max of 40 items*

***Recommendation for change in policy*** - goes to NEOS directors and they will implement the change

*2.3 External Client Privileges*

***2.3.3 add "except for a limit of 30 items per"***

***2.4.1 "except for a 30 item limit at a time"***

***Anne will bring this to Executive and then to the Directors' meeting on November 25, 2016***

8. Barcode Group - Meeting Next week (CJ)

*Anne noted that Executive had suggested there was no need to limit the initiative to TAL member libraries, that any home barcode could be used. The Barcode Group will work out policy and procedure changes that will be necessary, including for cases where there might be a conflict.*

9. Next Meeting – February 28, 2017 @ 10:00AM