**NEOS Access Services Committee Meeting**

**April 21, 2020**

**Via teleconference**

**Minutes**

**Present:** Paul Pype (Alberta Government Library). Melanie Belliveau (Alberta Health Services), Wilmer Tenerife (Burman University), Roberto Pellegrino (Alberta Innovates), Debbie Quast (Concordia University of Edmonton), Brenda Zimmerman (Grande Prairie Regional College), Kathleen Brennan (Keyano College), Kathy Williams (Lakeland College), Lana Thompson (MacEwan University), Rachel Martins (Northern Lakes College), Samantha Nugent (NorQuest College), Barb Mahoney (Red Deer College), Karina Dunn (Vanguard College), Peggy Morgan (University of Alberta ITS), Elaine Coupland (University of Alberta ITS) (Guest), Anne Carr-Wiggin (NEOS).

**Regrets:** Roger Salus (Covenant Health), Bonita Bjornson (King’s University), Jim Derksen (Newman Theological College), Kelsey McMann (Olds College), Natalya Brettle (University of Alberta).

1. **Welcome and introductions**

Welcome to Elaine, who is working with Peggy on knowledge transfer before Peggy’s retirement.

1. **Report – extending Secondary Borrower loan periods**

Lana, Peggy, Anne had formed a group to review the implications for extending loan periods to Secondary Borrowers and had surveyed members. Results of the survey and Peggy’s background document are attached.

The group reviewed the survey responses. There was a range of positions. Generally, the group found that the responses suggested:

* 4 week loans with four renewals
* 1 week before recall and seven days to return (the status quo; borrowers get a two week loan)
* Recall overdues of $2 a day

There are various issues to be considered:

* Some libraries have primary client loan periods of less than 4 weeks, and these libraries would have to consider whether to change their primary client loan periods.
* There was a range of responses regarding overdue fines. In particular, the U of A charges its primary borrowers $5 a day recall overdue fines and would have to consider this if the Secondary Borrower rate was $2.
* Libraries who serve distance clients (e.g. AHS and AGL) experience the situation where it may take up to a week each way to send items back and forth, so the loan period for recalled items is very much curtailed.
* Libraries have different loan periods for different item types.

Next steps:

The group decided that more consultation within libraries is needed before a decision can be made about a recommendation for a policy change:

* Using their circ maps, libraries should review the print item types that they currently lend to secondary borrows, compare the loan periods that their primary users receive for the same item types and then identify the ones that are less than four weeks. In those cases, would you be willing to extend the loan periods for primary users to at least four weeks? Please contact Peggy if you need help reading your circ map.
* Committee members should consult within their libraries about the implications for the loan period and overdue recall fine changes for their current practices with their primary clients.

Anne will provide an update for Directors at their meeting on May 22.

The results of the consultations will be discussed at the next Access Services meeting in early June

1. **Changing COVID-19 related due date**

Peggy has set the due date for items checked out between March 1 and May 30 to May 31, and has set libraries as closed in the calendar until May 30.

The committee decided that in early May Peggy will change the due date to September 30 and mark libraries closed until that date.

As libraries reopen they can modify their closed dates in the calendar.

There are situations to be aware of that might need manual modifications, for example laptop loans at MacEwan. Peggy will give advance notice of when she is going to make the changes so that those libraries that manually modify equipment due dates will be able to adjust those dates accordingly.

1. **Aged fines reports**

Peggy usually runs the Aged Fines report at the end of each library’s fiscal year but wanted to confirm that libraries are ready for their reports and that there are no barriers to accessing the finished reports in WorkFlows during library closures. There are six libraries with fiscal year ends of March 31 (AGL, AHS, Alberta Innovates, Concordia, Covenant and King’s) and two with April 30 (Burman and Vanguard). These libraries will confirm with Peggy that they are ready to have their reports run.

1. **Update on Symphony web client**

Elaine reported that UA ITS has been testing the Symphony web client and it will be installed on Friday. Libraries will have access most likely early next week. The web client has the same functionality as the regular version, although Elaine reports it is a little clunky. People will have individual user accounts to access the web client. Their custom properties will not carry over into the web client, but once they set them they will stay. Elaine is anticipating some issues and questions over the startup period, and libraries can use the normal libhelp@ualberta.ca to contact ITS staff.

1. **Preparing for re-opening – materials handling**

Anne has gathered [research and recommendations from a variety of sources](https://docs.google.com/document/d/1WyqLHtNy0ch5uaswq9ABVhRB6CXtpvnGqehS2i4V3gA/edit?usp=sharing) on handling library materials during the pandemic and has drafted protocols for handling shared and returned materials based on the findings and recommendations:

**On reopening bookdrops:**

If bookdrops have been closed since March, the items are safe to handle.

**Newly returned items:**

Quarantine items for at least 24 hours. 72 hours is recommended if there are items with plastic covers or containers.

Staff should wear gloves if possible when moving items into quarantine and remove the gloves immediately afterwards so as not to accidentally touch anything else.

After removing and discarding the gloves, staff should wash their hands for 20 seconds, following [Government of Canada guidelines](https://www.canada.ca/en/public-health/services/publications/diseases-conditions/reduce-spread-covid-19-wash-your-hands.html). Staff may also use hand sanitizer, particularly if washing facilities may involve touching other things such as handles and doors to access them.

If gloves are not worn, staff should sanitize and wash their hands after handling the items.

Disinfection is not necessary. In particular staff should not attempt to disinfect archival materials or other valuable collections. The use of liquid disinfectants is harmful to library and archives materials and is not recommended.

**Items shipped from other libraries:**

Staff can assess whether the items have been in the container for over 24 or 72 hours and handle accordingly.

When opening the container, staff should use infection control measures. Ideally after opening the container, they should wash their hands for 20 seconds, following [Government of Canada guidelines](https://www.canada.ca/en/public-health/services/publications/diseases-conditions/reduce-spread-covid-19-wash-your-hands.html). Staff may also use hand sanitizer, particularly if washing facilities may involve touching other things such as handles and doors to access them.

1. **Online payments for lost books**

Samantha sought input from libraries on how they handled payments for lost books that were made elsewhere in the institution and may be for other libraries’ books. Committee members shared information and Elaine will also check with UA ITS and provide information on the method used by UAL and MacEwan, which may involve a SirsiDynix Web Services subscription.

1. **Peggy’s retirement**

The committee was sad to learn that Peggy will be retiring as of May 31. She has been a key member of the committee for many years, first as a UAL member representative when she was head of circulation at the Cameron and Rutherford libraries, and later as the Symphony specialist for UA ITS. Her depth of knowledge of both technical aspects and public service aspects is unparalleled, and she brought a positive and congenial approach to the work of the committee. The committee wished Peggy the best in her retirement.

1. **Next meeting; early June, date TBD**

# Extending Loan Periods for Secondary Users

## Definitions:

* secondary users include all primary profiles borrowing at institutions other than their own
* external users include user profiles NEOS-EXTRN and NEOS-TAL and are not part of this new initiative

## Background:

* historically secondary users were able to borrow item type BOOK (two weeks, $1.00/day fine, renewals have increased from 2 to 4 renewals). Currently secondary users can also borrow non-print item types such as MEDIA,VIDEO, MAG\_MEDIA, albeit for shorter periods
* recalls are applied on loans to primary user profiles if they exceed two weeks; recalls are not applied to loans to secondary and external users
* UA primary users generate 79% of the current recalls; most UA items can be borrowed for a term
* recall notices are not generated for items due in less than seven days or for overdue items although a new recall notice could be scheduled to include these items
* note: modifying due dates for items checked out for two weeks or less does not make these items recallable; recalls are based on the loan period as determined by the circ rule and not by the modified due date

## Current configuration:

* recall fine rates vary across NEOS depending on the user profile. For those libraries that do charge overdue recall fines:
	+ most sites fine between $0.25 - $1.00/day
	+ Concordia - $2.00/day
	+ Kings - $2.00/day
	+ UA - $5.00/day
* secondary users are fined $1.00/day for regular overdues
* users are guaranteed a two week loan on items borrowed for more than two weeks. At the earliest, a recall notice is sent on day 8 of the loan; the recall due date falls on day 15.
* recall due dates are based on:
	+ the recall loan period (seven days) + recall grace period (seven days) = the guaranteed two week loan period.
	+ if the guaranteed loan period is extended, then the recall loan period or the recall grace period (or both) could be changed

## Considerations:

Secondary users:

* look at current loan periods – print item types receive two weeks/four renewals; non-print item types vary. Must determine:
	+ the item types affected
	+ the new loan period and renewal limit
	+ the new recall fine rate
	+ how to handle items types with loan periods shorter than two weeks
	+ changes needed to the NEOS Policy on Sharing Materials document (Clause 2.2.4)

Primary users:

* look at current loan periods and recall fine rates. Must determine:
	+ the item types affected by the new secondary user extended loan period
	+ new loan periods and renewal limits
	+ new recall fine rates if necessary

## Decisions needed:

* which items types to include for extended loans
* when to recall (determine the recall loan period and recall grace period)
* new renewal limits and recall fine rates
* how to implement the change. Should we:
	+ modify primary user loan periods and recall fine rates first so that we can track the potential increase in recalls, and then
	+ modify secondary user loan periods/fines rates?
* when to implement the change. Should we aim for:
	+ Sept 2020 for primary users; Jan 2021 for secondary users
* whether to schedule recall notices for items due in less than two weeks or overdue items

## Process:

* consult with and obtain approval from all NEOS libraries for new loan periods/recall fine rates
* modify existing mapping for all secondary users to reflect changes
* add new mapping for NEOS-EXTRN and NEOS-TAL to exclude them from the new secondary mapping
* modify existing mapping for all primary users for those item types that secondary users will be able to borrow for extended periods
* use BCA to track the increase in recalls

**Summary of Survey Results**

1. **Loan period**

**If NEOS libraries decide to increase the loan period for secondary borrowers, how long should it be for print items?**

3 weeks - 5 responses (AHS, NorQuest, Covenant, RDC, GPRC)

4 weeks - 7 responses (Kings, AGL Concordia, NLC, MacEwan, Alberta Innovates, Lakeland)

6 weeks - 1 response (U of A)

**Comments**

* 2 concerns that 4 weeks is longer than primary loans
* Our loan period for our primary borrowers is only 3 weeks. It seems strange to me to make the loan period for secondary borrowers longer than primary borrowers.
* It would be great to have consistent loan periods across the board for all regular circulating items.
* 3 weeks would bring us in line with Edmonton Public Library loan period which might make it easier to remember for borrowers already used to public library.
* We would not want our primary users to have a shorter loan period than our secondary users and feel that 3 weeks with 4 renewals is an appropriate time to have our items signed out.
1. **Loans of other items**

**Should loan periods for other item types be extended?**

**No - 3 responses**

**Yes - 2 responses**

**Yes to DVDs, CDs - 3 responses**

* n/a
* DVDs, CDs, AV are fine @ 2 weeks. The usual 4 renewals should be retained.
* I would standardize DVDs to same loan period as books (not that we are too likely to have DVDs in our collections very much longer!).
* No
* We have no problem with this, but we rarely get requests for other item types.
* Concordia is okay with extending other loan types as well.
* we have no other item types and don't borrow them
* Would be nice to extend it to dvds and cds but I think changing the loan period for print will be enough
* No. As other collections are now available for checkout by secondary users, we feel that each location should decide individually as to the length of the loan periods for each item type. We do not feel it should be written into policy and that each location has the power to make decisions on their own items. A request should be made to the owning library if an extension is needed for a user in extenuating circumstances, unless otherwise agreed upon (like the agenda item we will be discussing for disabilities and extensions).
* We don't loan other materials so no opinion
* We would prefer to not extend the loan periods for other item types
* No.
1. **Renewals**

**How many renewals should there be for print items? (Renewals for other items vary.)**

2 - 2 responses (NorQuest, RDC)

3 - 3 responses  (AHS, NLC, MacEwan)

4- 7 responses (Covenant, AGL, Concordia, GPRC, Alberta Innovates, Lakeland, U of A)

1. **How long before recall?**

**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. How long should borrowers have an item before it is recalled (borrowers would still have seven days to return the recalled item)?**

1 week (status quo) - 8 responses (Kings, Covenant, RDC, AGL, Concordia, GPRC, Lakeland, U of A)

2 weeks - 3 responses (NorQuest, NLC, Alberta Innovates)

3 weeks - 2 responses (AHS, MacEwan)

1. **Recall fines**

**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 and U of A fines $5.00 per day. (Secondary borrowers are fined $1.00 per day for regular overdues.) How much should the recall fine for secondary borrowers be per day?**

$1 - 8 responses (NorQuest, RDC, AGL, NLC, MacEwan, GPRC, Alberta Innovates, Lakeland)

$2 - 3 responses (Kings Concordia MacEwan)

$5 - 1 response (U of A)

Same as primary users - 1 response (AGL)

**Comments**

* I think it should be the same as it is for primary users
* Is it possible to get a report on what the recall success rate is? Do Concordia/King's have similar success rate to getting items back as U of A? If reasonably good, would prefer to keep fines down to $2.00 / day.
* Our preference is for $1.00 per day; but we would accept maximum of $2.00/day