

LINC Policy Council’s Circulation Committee convened after the October LPC meeting and submits these recommendations for consideration by LPC. The committee is proposing that changes to the Shared Itype Policy be made in the following manner:

- The recommended changes and settings apply to what is defined as the ‘majority’ of a library’s collection. The committee understands that a library has the need to make changes to the recommended settings for special collections, for new materials, for unusual formats, for promotional events and materials, etc..
- Within Horizon, the majority of a library’s collection is anything in the itype ‘CR1’ or ‘CR2’ itype. Seventy-five per cent of all LINC libraries materials are in the ‘CR1’ and ‘CR2’ itypes.
- The committee believes that the recommended changes are intended to be a compromise agreement for everyone. The committee constantly revisited the charge given to them of lessening confusion to the borrower as the uppermost reason for making settings more consistent and predictable across the consortium.
- The committee also realizes that the different circumstances in school libraries dictates a different group of settings.
- As a group of recommended settings, the committee proposes that libraries change to the recommended settings by the start of the library’s next fiscal year.

Recommended Changes to Shared Itype Policy

Library-Specific Settings - Individual library-specific settings will be chosen from the values below for the shared itypes listed here. All libraries will be responsible for mapping these values to the itypes they choose to use:

	Existing Rules covered in Shared Itype Policy	Existing settings	Recommended Settings	Recommended Settings	Recommended Settings	RATIONALE
			*Public,	Academic, Special	*School	
Loan Period (days or hours)	The number of days that materials with this itype can be checked out (ex: 14)	0,1,2,3,5, 7,14,21,28 days	7, 14,21, 28	7, 14, 21, 28	7,14	Moving this direction will help us when we move to a new database platform as well as providing consistent expectations for patrons. As long as we allow patrons the capability to renew items then this will have a positive effect on patron interactions throughout the system.
Renewal Period (days or hours)	The number of days that materials with this itype can be renewed (ex: 14)	Same period as original loan period	Same as loan period	Same as loan period	Same as loan period	

Maximum Number of Renewals	The maximum number of times materials with this itype can be renewed (ex: 1)	0,1,2,3,5 times	3	3	3	The committee feels that the max number of OPAC renewals should be the same as the max number of renewals. Patrons do not understand the difference, and it is helpful to have consistency between these two areas. We want the patrons to have the ability to monitor and to administer their accounts. All renewal capabilities help that. If a patron is able to renew items three times from his home computer, it would stand to reason that "Max # of renewals" would be the same as "Max # of OPAC renewals".
Hold Shelf Period	The number of days that materials with this itype should sit on a hold shelf waiting for pickup, before becoming an expired hold (ex: 5)	3,5,7 (days), with items with short loan period having shorter hold shelf period	7	7	7	
Grace Period	The number of days Horizon waits, after an item is overdue, before it begins assessing overdue fines on items with this itype. In Horizon, if the item is returned after this period, fines will still be assessed for all grace days. If the item is returned during this period, no fines will be assessed. (ex: 3)	0,3,7 (days)	0	0	0	
Fine Rate	The amount (in pennies) of each daily fine (ex: 10)	0, 5, 10, 25, 50, 100 (pennies)	Continue with existing	Continue with existing	Continue with existing	

First Notice Delay (Days)	The number of days after an item is overdue that Horizon waits before Day End processes an overdue notice (ex: 7)	1,3,7,14 (days)	Continue with existing	Continue with existing	Continue with existing	
Notice Interval (Days)	The number of days between notices that Horizon waits before Day End processes another overdue notice (Second, Third, Fourth, etc.)	3,7,14 (days)	Continue with existing	Continue with existing	Continue with existing	
Maximum # of Notices	The maximum number of notices that will be generated once items in this itype are overdue (this does not include the Final Notice). This can be no higher than 5.	2,3,4,5 (notices)	Continue with existing	Continue with existing	Continue with existing	
Max # Out	The maximum number of items that can be checked out in this itype.	2,5,10,25, 50,75, 100,500, 9999 (items)	unlimited	Local Decision*	Local Decision*	It is very helpful to homeschool patrons to have a high number in this category. (Also, should a library have a low Max # out, a patron is at that limit and goes to another library for more materials, there will be a block that prohibits more items to be checked out. The desk staff would then either need to override the rule or turn away the patron. Low limits will also impede the patron's ability to get items from other libraries through the request system. We have materials on our shelves to be used and checked out. Anything that would impede that process is counter-productive.
Lost Processing Fee	A processing fee (in pennies) that is assessed when items with this itype are lost (ex: 300)	0, 300, 500, 1000	0, 500, 1000	0, 500, 1000	0, 500, 1000	
	New Settings Added to Shared Itype Policy					

Max # Overdue	The maximum number of items overdue before checkout is stopped		25	25	25	This will allow patrons to renew from home and use MyMediaMall far more effectively. If the limit is low, then the patron would need to call the library for renewals or just be unable to renew and incur unnecessary fees. If the limit is higher, then the patrons have more ability to renew items and more control over their fees and accounts.
Max Unpaid Fines	The maximum amount of unpaid fines before checkout is stopped		5.00	5.00	Local Decision*	This will allow patrons to renew from home and use MyMediaMall far more effectively. If the limit is low, then the patron would need to call the library for renewals or just be unable to renew and incur unnecessary fees. If the limit is higher, then the patrons have more ability to renew items and more control over their fees and accounts.
Max Days Overdue	The maximum days an item is overdue before checkout is stopped		unlimited	unlimited	unlimited	Remove--redundant with the time period when an item ages to "lost".
Max Claimed Return	The maximum number of claimed return before checkout is stopped		2	2	1	
Max Lost	The maximum number of lost items before checkout is stopped		1	1	1	
MAX OPAC RENEWALS			3	3	3	
MAX AMT BEFORE BILLING NOTICE			5.00	5.00	Local decision	This will allow patrons to renew from home and use MyMediaMall far more effectively. If the limit is low, then the patron would need to call the library for renewals or just be unable to renew and

						incur unnecessary fees. If the limit is higher, then the patrons have more ability to renew items and more control over their fees and accounts.
MAX# OF HOLDS (REQUESTS) BY BORROWER			100	100	LOCAL DECISION	This is the total number of requests a borrower can place in Horizon, we need to keep the number high so borrowers can create/suspend as needed.