

Rationale for Changes to Shared Itype Policy

LINC Policy Council has been examining more consistent circulation rules for all of the LINC libraries. The goal of this examination has been to determine how to provide the best possible end-user experience for the patron.

With the large amount of resource-sharing among LINC libraries and with circulation rules currently set by individual libraries in hundreds of different ways, the patron experience can be bewildering and uncertain. Different loan periods, different fine rates, different settings on renewals, and other settings all lead to confusion and frustrating customer experiences.

If all libraries materials follow similar circulation rules, patrons are better able to track their materials and staff are better able to understand and explain those rules. Although LINC Policy Council understands that there are many reasons why libraries have different rules, this proposal is developed as a statement of consistency, with these recommended settings (below) what libraries should strive to follow.

- The recommended changes and settings apply to what is defined as the ‘majority’ of a library’s collection. LPC 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.
- LPC believes that the recommended changes are intended to be a compromise agreement for everyone, with the main reason for change to lessen confusion to the borrower by making settings more consistent and predictable across the consortium. LPC also realizes that the different circumstances in elementary and junior high libraries dictates a different group of settings.

Other benefits from these changes would be more consistency for circulation staff system-wide. Fewer variations on the Itype settings will help create more stable patron interactions for anyone performing circulation functions involving other LINC libraries. Also, management of the LINC automation system in the most efficient way possible and potential issues with migration to a different system necessitate the need for more consistent policies.

LPC has approved these recommended settings, based on feedback from the LINC Directors Group. Timeline for implementation is that changes should be made by libraries by January 1, 2009. In order to answer questions or expedite this timeline, LPC will two ‘town hall’ meetings with LINC Directors to explain these changes and solicit feedback for additional consideration.

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
			*Public, Academic, Special, HS	*Elementary/JH
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	Books = 21 Video/DVD = 7	Books = 7 Video/DVD = 7
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	Books = 21 Video/DVD = 7	Books = 7 Video/DVD = 7
Maximum Number of Renewals	The maximum number of times materials with this itype can be renewed (ex: 1)	0,1,2,3,5 times	Max # of Renewals = 3	Max # Renewals = 3
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
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
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
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
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
Maximum #	The maximum number of notices that will be generated	2,3,4,5	Continue with	Continue with

of Notices	once items in this itype are overdue (this does not include the Final Notice). This can be no higher than 5.	(notices)	existing	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)	50 or 100	Continue with changes to existing
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
	New Settings Added to Shared Itype Policy			
Max # Overdue			15	0
Max Unpaid Fines			5.00	0
Max Days Overdue			30	0
Max Claimed Return			2	1
Max Lost			1	1
MAX OPAC RENEWALS			3	3
MAX AMT BEFORE BILLING NOTICE			5.00	Local decision
MAX # OF REQUESTS BY BORROWER			100	Local decision