

To: MORE Director's Council
From: MORE Bibliographic Committee
Re: Owning versus Lending Statement
Date: 5/18/17

It was brought to our attention that the MORE Loan Rules Committee, a subcommittee of the Resource Sharing & Collection Development Committee, has been evaluating the differences between owning and lending library loan rules. They compiled pros and cons in addition to how other library systems configured their loan rules. We would like to evaluate the cataloging and database maintenance aspect of the change as well. The Bib Committee is concerned with the amount of work that would need to take place for MORE to switch the complete loan rule structure. We are concerned that, to date, the amount of time and effort needed for the transition has not been completely evaluated. There will be a considerable amount of time needed from individual library staff in addition to MORE staff for planning and implementing the transition.

Transition Process –

Due to the way that loan rules, including checkout periods and fines, are determined we would need to completely recreate our loan rules and loan rule determiner table. Each library would need their own set of loan rules created and every system item location and iType would have to be assigned to a corresponding loan rule within the determiner table.

1. Each library must review and update their item locations, loan rules, iTypes and notices text. Would need completed spreadsheet from each library. MORE staff would plan a visit to each library to go through all of the information together to ensure there are no questions and no details are overlooked. Attached is a sample of one library's item locations that would need to be reviewed. There are a total of 2,778 item locations, ranging from 41 to 107 per library.
2. MORE and Library staff would have to create and standardize iTypes. Attached is a listing of all current iTypes for review. For example, right now iType 0 for book is used in many different loan rules, and different location codes determine the checkout period, if holds and renewals are allowed. In the lending library rules model item location codes are disregarded and each scenario for books that any library uses will have to be represented by an iType. So we have 0, 60 and 66 for 3 week books with holds and renewals; 59 and 69 for 2 week books with holds and renewals. With lending loan rules we would add a new iType for 3 week books with no holds and no renewals, another for holds but no renewals and another for no holds but renewals. Same for the 2 week books and the one week books. Not all libraries use all combinations, but when they are present in any library they need to be accounted for.
3. MORE staff enters information into spreadsheet and establishes corresponding pType, iType and loan rule.
4. MORE staff creates new Loan Rules in table.
5. MORE staff enters information into Loan Rule Determiner Table based on Loan Rule Table and master spreadsheet from library staff.
6. Once everything is entered, MORE and library staff would have to update item records by item location to correspond to new iTypes.
7. Library staff would need to create verbiage for all notices, email, text or mail. Notices include, Overdue 1, Overdue 2, Replacement Bills, Statement of Charges, Hold Pick-up notices, Hold Cancellation notices and any other notices used by each library.
8. MORE staff would need to enter all notice texts for each library as print template or notice template.

9. MORE staff would have to completely rebuild the loan rule determiner table when all the libraries are closed so when all libraries open in the morning the new change would take effect.
10. Before the change would take effect, all libraries would have to update their customer brochures, signage and possibly websites. This would involve staff training and the publicity campaign for customers with ample time before the change.
11. Once the change would take effect, library staff would have to update their new item record templates based on changes. Catalogers would need to learn and apply the new structure to their work.

The extensive, manual process of entering all data and ensuring proper coding, is estimated to take a minimum of 6 months.

Concerns and Questions –

Since each library would have complete control over loan rules for other libraries' items, would all libraries be okay with their materials going out for a different length of time? For example, if DVDs go out for three weeks rather than one week or the new best sellers going out for three weeks rather than two weeks? That could potentially drastically slow down turnover rate for your items and customers.

Library Boards would need to approve any adjustments of fines and checkout periods for their materials so do they need to approve the changes in how their materials are handled at other libraries?

Have we considered how fines are allocated through e-Commerce? Can fine disbursement be adjusted to go to the lending library? It doesn't seem fair that a fine free library would get revenue if their materials are checked out from another location, yet other libraries will not get any revenue from their items going out at a fine free library. Currently we have three completely fine free libraries in the system and other libraries contemplating removing fines.

Would we create more competition between libraries? Are libraries with a neighboring library without fines going to lose customers? Savvy customers could request all their items online, go to a neighboring library, pick up all of our materials and have no fines if returned late. This could also result with increased courier traffic.

Either way, customer education is key. With any change there would need to be more customer education. They will need to rely strictly on their due date slip rather than the labeling on the physical material. Many materials have labels indicating the checkout periods, therefore creating confusion between labels and due dates.

As a whole, due dates are not standard within each library. For instance, within most libraries there are 3 or 4 different checkout periods for DVDs – regular 1 week DVDs, 2 week TV seasons or extended length films, 3 day Lucky Day DVDs and possible 3 week exercise DVDs.

If MORE decides to implement lending library loan rules and isn't satisfied with the change, the loan rule determiner table would need to be rewritten again to go back to owning library rules.

With all of this outlined, we are seriously concerned about the ramifications that have not yet been explored.

nrfic	New Richmond Fiction								
nrfly	New Richmond on the fly								
nrfsf	New Richmond Fantasy/SciFi								
nrill	New Richmond ILL								
nrjbb	New Richmond Juv Board Bk								
nrjbc	New Richmond Juv Books/CD								
nrjdi	New Richmond Juv Prof Col								
nrjdv	New Richmond Juv DVD								
nrjec	New Richmond Easy Character Series								
nrjfl	New Richmond Juv Foreign Lang								
nrjgn	New Richmond Juv Graphic								
nrjho	New Richmond Juvenile Holiday Books								
nrjhp	New Richmond Hooked on Phonics								
nrjlp	New Richmond Juv LaunchPad								
nrjma	New Richmond Juv Magazine								
nrjmu	New Richmond Juv Music CDs								
nrjnf	New Richmond Juv Non Fic								
nrjpt	New Richmond Juv Parent/Teacher Col								
nrjse	New Richmond Juv Series								
nrjur	New Richmond Juv Reference								
nrjuv	New Richmond Juv Fiction								
nrjvi	New Richmond Juv Videos								

nrkbf	New Richmond Bifolkal Kit								
nrkit	New Richmond Story Kits								
nrldb	New Richmond Lucky Day Books								
nrldd	New Richmond Lucky Day DVDs								
nrlea	New Richmond Leap Pads								
nrllpf	New Richmond Large Print								
nrllpn	New Richmond Large Print Nonfiction								
nrllmag	New Richmond Magazines								
nrllmys	New Richmond Mysteries								
nrllnec	New Richmond New CDs								
nrllnew	New Richmond New Books								
nrllnon	New Richmond Non Fiction								
nrllrovr	New Richmond Oversize								
nrllrpam	New Richmond Pamphlets								
nrllrpbk	New Richmond Paperbacks								
nrllrpro	New Richmond Professional								
nrllrref	New Richmond Reference								
nrllrsci	New Richmond Sci-Fi								
nrllrsto	New Richmond Storage								
nrllrvgm	New Richmond Video Games								
nrllrvid	New Richmond Videos								
nrllrvin	New Richmond Videos NF								

nrwes	New Richmond Westerns								
nrwis	New Richmond Wisc Coll								
nryaf	New Richmond YA Fiction								
nryam	New Richmond YA Magazines								
nryan	New Richmond YA Non Fiction								
nryas	New Richmond YA Series								
nrybc	New Richmond YA Books on CD								
nrygn	New Richmond YA Graphic								

**Please keep in mind if an item location currently uses multiple iTypes, there would need to be a line for each one.

iTypes

- 0 Books
- 1 Magazines
- 2 Videocassettes
- 3 Music CD
- 4 Audiobook/Cass
- 5 Large Print
- 6 3-D objects
- 7 Art prints - no holds
- 8 CDROM/software
- 9 DVD/Videodisc
- 10 Equipment
- 11 16mm films
- 12 Filmstrips
- 13 Game/Toy
- 14 Kits
- 15 LP records
- 16 Maps
- 17 Microform
- 18 Music cassettes
- 19 Newspapers
- 20 Pamphlets
- 21 Puppets
- 22 Sewing pattern
- 23 Slides
- 24 Book and cassette
- 25 Book and CD
- 26 Book and CDROM
- 27 Web links
- 28 Puzzles
- 29
- 30 Books<8
- 31 music cd<8
- 32 music cass<8
- 33 audiobook<8
- 34 maps<8
- 35 Musical scores
- 36 Audiobook/CD
- 37 ILL loan items
- 38
- 39 MP3 Audiobook
- 40 MP3 Music
- 41 DVD - 3 Weeks
- 42 VHS - 3 Weeks
- 43 Internet PCs
- 44 Knitting Needles
- 45 Big Books

46 Ref/Noncirc Book
47 Ref/Noncirc CDROM
48 Ref/Noncirc Video
49 Ref/Noncirc DVD
50 Board bk
51 Board bk - no holds
52 Kits - no holds
53 Photograph
54 Graphic Novel
55 Puppets - no holds
56 Puzzles - no holds
57 Braille Book
58 1 week books
59 2 week books
60 Paperback Mass mkt
61 Fragile book - no holds
62 Equipment - no holds
63 Game/Toy - no holds
64 Special program - no holds
65 DVD - 2 weeks
66 Softcover
67
68 Grant
69 2 week softcover
70 Game discs - no holds
71 Game disc
72 Game cartridge - no holds
73 Game cartridge
74
75 Large Print Softcover
76 Laptop
77 Keyboard
78 eReader
79 eTablet
80 Downloadable Audiobook
81 Electronic Book
82 Electronic Reference
83 Electronic Full Text Magazine
84 Downloadable Video
85 1 Week kits
86
87
88 Mobile Hotspot
89
90 Grant book
91 Grant magazine
92 Grant audiobook/CD

- 93 Grant audiobook/MP3
- 94 Grant DVD/videodisc
- 95 Grant music CD
- 96 Grant equipment
- 97 Grant game disc/cart
- 98 Lucky Day Book
- 99 Lucky Day DVD
- 100
- 101 Rental 3 day
- 102 Rental 10 day
- 103 Backpacks
- 104
- 105 Wig
- 106
- 107 BluRay/DVD combo 2 weeks
- 108 BluRay/DVD combo
- 109 BluRay
- 110 BluRay - 2 weeks