

Fulfillment and Financial Policies Working Group
Recommendations to Resource Sharing Governance Task Force
10/18/2016

As the CSU moves towards implementing a Unified Library System using Ex Libris' Alma, the Access Services Working Group recognizes this transition as an opportunity to update or adjust policies to make working in the new system easier for staff and library patrons. As the CSU campuses work together to share resources, our working group would like to propose a few policies we would like the Resource Sharing Task Force to adopt to match proposals we plan to send to COLD.

Policy Requests:

1. Loan Period: 30 days with 2 automated renewals (No Holds/Recalls except by Staff)

Since some campuses have moved to semester-long loan rules, we would like to ensure that the resource sharing loan policies reflect these changes. We propose a 30 day loan period with 2 automated renewals. We are requesting 30 days with automated renewals instead of a 90 day loan period because we want our library patrons to receive notices for each renewal reminding them they have library material and to return it if they are no longer using it.

To give borrowers the full loan period, holds and recalls should only be placed on items by the loaning Library staff if the item needs to be returned earlier.

2. Media items are loanable for 7 days

Media items are currently loanable through Interlibrary Loan by some CSU Campuses. We would like to see all campuses loan media material, whether through Alma Resource Sharing or ILL. If loaned through Alma, we believe a loan period of 7 days is sufficient, possibly with one auto renewal.

3. No daily accruing fines and billing to occur 30 days from the final due date.

77% of Campuses that responded to a financial policy reported that they would be in favor of removing daily accruing fines from main collection items. Currently, some campuses do not charge daily fines for items borrowed from other CSU campuses through ILL. We would like items borrowed from the CSU through Alma to reflect this policy.

To keep policies consistent and easy to remember, we would like items to be billed 30 days after an item is due.

4. Set Replacement Cost for items and additional wording in the policy to include OR COST OF ITEM.

Our work group agrees to having a set replacement cost across the CSU with the option of charging the price of the item if it is determined that the item is worth a lot more than the replacement cost. Ultimately we would like COLD to mandate a replacement cost. Some examples from our groups were \$115.00, \$140.00, or \$150.00 including processing fees.

5. No recalls unless they are made by staff to retrieve materials for Course Reserves. Recalls should be very rare.

The Access Services task force agrees that items should not be recalled, and requests should be routed through Interlibrary Loan if an item is not available.

6. Use of the Fulfillment Network

This function allows for visiting patrons. We do not want to manually create patron records and then have to verify the visiting patron is actually associated with another campus.

7. Conduct a study about lost items loaned through resource sharing one year after implementation to discover if transferring replacement costs to loaning campuses is viable.

Our group could not come to a consensus regarding policies about allowing patrons to turn in replacement books and whether replacement costs should stay at the borrowing institution or sent back to the loaning institution.

Currently the CSUs do not charge each other for lost material. We propose continuing this practice for one year to gather data about how lost items affect each campus and if it is worth it charge each other. We understand libraries would like to see the cost of lost material returned to the loaning campus, but we are worried about how this transfer would work and if it would create more staff work at each campus or affect library patrons. Also, some scenarios like refunds for items returned after a bill was paid could become more difficult.

The choice regarding how replacement costs are handled affects a proposal, making it mandatory that CSUs accept a replacement book if an item is lost or destroyed. If the loaning library doesn't receive money for a lost item, then receiving a replacement book is the best option. If the campus does receive replacement costs and has a choice about receiving a replacement copy or replacement costs, then the group thought the decision should be made locally by the libraries acquisition department.

