

## **MOBIUS Access Advisory Committee Meeting July 22, 2003**

Present: Elise Fisher, WJC (WILO), Scott Britton, Wash U (WASHU), Tom Schultz, William Woods (Arthur), June DeWeese, UM-C (MERLIN), Loretta Ponzar, Jefferson (Archway), Ann Riley, St. Louis Community College-Meramec (Archway), Donna Baron Springfield Greene County PL (COOL), Marian Craig, CMSU, (QUEST), Vicki Wainscott NWMSU (Towers), Linda Medaris CMSU (QUEST), Ellen Eliceiri Webster U Eden-Webster Library System (Bridges), Sharon Upchurch Culver Stockton (Lance), Mary Jo Barbush-Weiss UMR (MERLIN), Gordon Johnston TRCC (Galahad), Robin Kesphol MCO, Pat Seavey MCO, Jim Dutton MCO, Gary Harris MCO

Jim Dutton convened the meeting at 10:10 a.m. and introductions were made and first-time attendees welcomed.

The minutes of the April 4, 2003 minutes were approved as finalized and are now on the web.

### **MCO Update—Jim Dutton**

- 1-Regarding the LDR update—all files have gone to OCLC and library staff in each library should be coding serials for a December load.
- 2-The Authority file has been loaded for MOBIUS. 1,631,581 records were loaded.
- 3-MARCIVE is adding to any record that has an 856 field the phrase “freely available”
- 4-State Historical Society Newspapers will be loaded later this month
- 5-WILO add-on libraries will start Inn Reach borrowing in Fall Semester. St. Louis College of Pharmacy will also start Inn Reach Borrowing in the Fall Semester.
- 6-Springfield Greene County PL will go live on September 2.
- 7-MCO received an LSTA grant to add OCLC #s to local records and a de-duping project will be done on MOBIUS records

### **CLUSTER Reports**

- 1-Arthur- No report
- 2-MERLIN-At their latest meeting, the MERLIN Cluster voted upon a MOBIUS Net Loss Reconciliation proposal to be discussed today; discussed canceling holds without placing items in “missing status,” and how to convey the message that some items are not missing but can not be lent because they are too large, too brittle, etc.; have begun to write a circulation policy for the MERLIN Cluster recording current practice; and discussed students enrolled on multiple campuses simultaneously and the issues involved.
- 3-Archway-St. Louis College of Pharmacy is live for cluster borrowing and are learning the processes. Public display labels in the local catalogs are being reviewed and some changes are being made.
- 4-Wash. U-Their catalog was down last week due to a hardware failure. There is a renovation project underway and some offices have been moved temporarily. Circulation and Reserve checkouts have been merged and are now one unit under Luberta Rochelle. Once the renovation is completed in December, they will all have to move again. Scott asks everyone’s patience during all of this.

5-Towers—Two questions were raised for committee members' responses. Do we limit the number of traditional interlibrary loans that any one person can submit? Do we charge our own patrons for traditional ILL? Bridges representative responded for her library that if one person turns in a lot of requests at one time (like 100 the same week), the patron is asked to prioritize the requests and a few are processed at a time. Wilo's representative responded that her library does not charge patrons for ILL but if there is going to be a charge to their library, they require a professor's signature that the item is needed for research before they will order that item for a student.

6-Bridges-Eden Webster has been in their new building for 21 days!

7-Quest-Marian Craig is the new representative for Quest. Quest is discussing implementing the "library priorities" table and discussing bib level vs. item level holds. The priorities table will assist in selecting an item for a bib level hold. There was discussion about whether or not it would work the way the libraries would like it to work within our type of environment.

8-WILO- Three new libraries have been added recently. Those are Rockhurst, St. Paul's School of Theology, and Midwestern Baptist Theological Seminary. They are looking at the procedures they have been using in the past when WILO was a smaller cluster and may be changing some since there are more libraries in the cluster now.

9-Springfield Green County did not have a report but Donna said that she has many unanswered questions and is hoping we will all help her answer them.

We welcomed Chair, Sharon Upchurch at this point.

### **Load-Balancing**

Discussion regarding whether or not WILO and ARCHWAY who have had new libraries added to their clusters should be taken back down to the lower level to give the new places an opportunity to catch up. Decision made that they will be taken down for one semester.

### **Lending/Borrowing Statistics and Lenders of Last Resort Review**

We first looked at the combined numbers of returnables and non-returnables to see what the balance looked like before turning our attention to non-returnables. There are 10 libraries that are net lenders of non-returnables but some are very small and the numbers of items are also very small. UM-C HSL with a ratio of 5.1 was added to the list of lenders to be used as last resort. UM-C (non-HSL) has a ratio of 3.2, Truman 2.4, Kirksville Osteopathy 2.6, Logan 2.8. No other solutions were discussed other than to keep these libraries and the ones previously on the list as "lenders of last resort."

### **Circulation/ILL Contacts List**

MCO was asked to change the display of the list so that the contact person and phone number are on the same line in order to reduce the confusion resulting in the wrong person being called in some instances.

### **Borrowing/Lending Statistics –Springfield Greene County**

They will be their own cluster (COOL) and their statistics will be counted the same as everyone else's. They will be on the spreadsheet and are encouraged to turn in non-returnable statistics just like everyone else does. It was determined that this would be in their best interest to do so.

### **Reconciliation Process**

Much discussion ensued. The MERLIN proposal was thoroughly discussed. Robin Kesphol said that George Rickerson had said that while MCO could handle the responsibilities outlined in the MERLIN proposal, he really does not want MCO to do it and if they do it, there will need to be reimbursement to MCO for the additional work.

**Action Item #1 is that we are to remind everyone to block each of our own patrons as they are billed for non-returned items.**

We discussed the current reconciliation process that is supposed to happen in the month of August. We looked at the MOBIUS Lost Book Policy and made some revisions that Sharon Upchurch will take to the MOBIUS Executive Committee meeting on Friday, July 25th.

Changes include: Change #5 to read MUST instead of "should" in the first sentence so that it now reads "Borrowing libraries must block patrons who have been billed (books are 45 days overdue)." The new #6 will read "Reconciliation requires each borrowing library to resolve billed items with the lending library as soon as practical and no later than one year from the billing date." The last sentence of #3 (Any special negotiations between libraries should not be a part of the annual reconciliation process described below.) was deleted. #7 was deleted totally because it speaks of an annual reconciliation. (Moved by Elise Fisher, seconded by Linda Medaris and passed by the committee) #6 which outlined the process for an annual reconciliation in August was also deleted and replaced by the new wording above. (Moved by Scott Britton, seconded by Elise Fisher and passed by the committee) Further, the new #6 was then moved between numbers 2 and 3 and became the new #3 and all below will be re-numbered.

As soon as all of the revisions have been approved by the MOBIUS Executive Committee, the revised document will be posted on the MCO website for our use.

There was also a revision on the regular MOBIUS Circulation Policy made to #13. We deleted the words "No refunds will be given after the MOBIUS annual reconciliation." Since there will be no annual reconciliation, we wanted to make this policy consistent with the MOBIUS Lost Book Policy. A new sentence was added "No refunds will be given after one year from the billing date." (Moved by Mary Jo Barbush-Weiss and seconded and passed by the committee)

**Lanter Codes**

There was discussion about the codes for SWBAP being the same but representing two different Lanter deliver stops. (Mary Jo Barbush-Weiss moved and Loretta Ponzar seconded that we ask MCO to change the codes to follow the rules that follow. Passed by the committee)

Codes should follow these rules:

- 1- Codes should be created so that the codes and full names follow the same alphabetical order whenever possible.
- 2-Each Lanter stop should have a unique code (the Lanter code is all caps and occurs before any hyphens) and if #1 is followed, they will.

**Pick Up Anywhere Update**

Four institutions in different clusters will participate. UM-C (MERLIN), Washington U (WASH U), William Woods (Arthur) and Central Missouri State (Quest). There will be a meeting immediately following this one where participants will learn about the process and how testing will proceed and will determine a start date. There will be reports as the test proceeds.

Jim Dutton gave a short demo of how it will look on the screens.

**Bookbands**

The unique Pick-up Anywhere book bands (which will be green) are already on the website and ready for use.

Towers asked why the “library use only part” has been eliminated from the new edition of the book bands for regular loans. No one uses that information any longer. It was a part of a turnaround time test in the past.

**Other Business**

Loretta Ponzar kind of volunteered and was subsequently elected chair for the coming year.

**Next Meeting**

October 28, 2003 was chosen as the next meeting date

Respectfully submitted:

June DeWeese (MERLIN) recorder for the day