



MOBIUS ACCESS ADVISORY COMMITTEE

MAAC MINUTES Oct 31, 2000

Chairperson: Judy Fox, Washington University

MOBIUS ACCESS ADVISORY COMMITTEE MEETING

October 31, 2000

(AMENDED 11/17/00)

In Attendance:

Joni Blake, Stephens College (Arthur)
Mark Wahrenbrock, Mobius Consortium Office
Mary Jo Barbush-Weiss, UMR (MERLIN)
Scott Britton, Washington U.
Vicki Wainscott, Northwest MO State U. (NORTHWEST)
Judy Fox, Washington U.
Gaye Pate, Mo So St.College (SWAN)
Elise R. Fisher, William Jewell (WILO)
Larry Onsager, Kirksville College of Osteopathic Med. (LANCE)
Gordon Johnston, Three Rivers Community College (SOUTHEAST)
Linda Medaris, Central Missouri State University (QUEST)
Robin Kespohl, Mobius Consortium Office
Gary Harris, Mobius Consortium Office
Ellen Eliceiri, Eden Webster Library (BRIDGES)
Loretta Ponzer, Jefferson College (ARCHWAY)
Carol Warrington, Forest Park Community College (ARCHWAY)

Agenda:

1. Lost Book Policy
2. Request Balancing Table
3. Visiting Patron Update
4. Statistics
5. Use of PINs in MOBIUS Consortial Borrowing
6. Loan Period, Renewals, Maximum Requests
7. Cluster Updates

TOPICS DISCUSSED:

Cluster Updates:

Arthur - There have been several personnel changes. New staff are being trained.

Merlin- Statistics are being grouped.

Swan- Still working out the bugs in the new system. Borrowing is very popular.

Washington U.- Brought up Millennium Circulation with very few problems.

Wilo - Catalog training is ongoing; circulation training will begin in November.

Lance- Filling out circ sheets and loan rules. Test-PAC will start early November.

Southeast- Still working on a new name for the cluster.

MOBIUS Update:

Production machines will move to update D in November. This includes the INN-Reach central box.

Replacement Cost Discussion:

- What should the price be? \$50-\$175
- Keep figure realistic
- Lower replacement cost should dispel negotiation
- If a higher fee is charged there must be room for negotiation
- Costs should be averaged out with books that are lost
- \$120 came from Ohio link-modeled on it and figure it was reasonable
- Merlin will change to \$175 as well as Columbia
- Notices say a "preset" price, but negotiable
- \$120 comes from loan rules-default item cost
- Change wording from "replacement" to "lost book" fee
- Agree to leave at \$120 and track it to see if it is reasonable
- Some libraries are interested in charging more than \$120
- Processing fee-replacement cost plus processing fee
- Favor uniformity-charge the same no matter what
- Half of those attending charge processing fees from \$3-\$15
- Replacement cost has to include the processing fee.
- Item cost can be returned but processing is kept. It is not refunded. The processing fee is really a billing fee.
- The bill needs to be reworded adding a definite date for return of the money.
- Changed processing cost replacement to \$100
- If not returned within 45 days the \$20 fee is not refundable
- Add another notice before bill
- overdue notice-3 days
- overdue notice-30 days
- bill-45 days
- Problematic if the billing cycle is too long
- You can do the institutional overdue report anytime
- Could we agree that we would send an overdue
- 5 days
- 30 days (warning that owe a lost book fee and a non-refundable processing fee of \$20 if not returned within 2 weeks)
- 45 days
- Propose the above to the Council Meeting
- Institutional overdue at 45 days
- Blocking-at what point should patrons be blocked as a result of overdue Mobius books. A local block affects the Mobius level. Manual block is put on by the staff. Any blocking done at local Innopac level affects the Mobius catalog.
- The patron's library can block them at anytime-you can define-you can choose
- Mobius can run reports, print them and mail them
- Blocking-is it acceptable to block between 45 and 74 days? -institutions can block their own patrons sooner. With a patron manual block, nothing can be checked out. If books are overdue, a block must be manually

enacted and should be blocked. When blocking a record put a message in the record.

- Manual block is a defined field.
- Amy patron listed on the institutional overdues should be manually blocked (with books that are 45 days or more overdue)
- Flexibility
- mediation on individual titles-time conserving
- the lender should have the option whether they receive the book back or the money
- flexibility on a library to library level
- "The borrowing library may contact the lending library to see if they will accept a replacement."
- The lending library must always accept the \$120 fee. If the borrowing library wants to negotiate they can contact the lending library to see if they will accept a replacement.
- Refunds-
- Discussion-
- Annual reconciliation once a year for items lost (money has not changed hands yet)
- Library is responsible for its own patrons
- A system of annual reconciliation will be developed to prevent the exchange of small checks-reconciliation for books overdue a year
- What do we consider lost?
- No matter what report it is on, it is the borrowing library's responsibility
- Lost-
- Materials are lost if they have not been received by the borrowing institution. Refunds allowed but handled locally.
- Washington University gives refunds for 6 months

Request Balancing Table:

- When someone issues a request, it goes to a cluster, either Merlin or random. New institutions are added with a low priority. Wait for another 6 months based on statistics to adjust priority levels. In 6 months, more clusters will be up. This only applies when more than one copy is available. There will be more discussion at the next meeting.
- Merlin has the highest priority
- You can set up a library priority level

Visiting Patron Update:

- All are using it now; how do we evaluate it?
- Uses institutional loan rule and not patron loan rule. Judy will write up a few questions to send out to find out how "Visiting Patron" is working.

Statistics:

- Important for continued financial support. Mobius office will begin to calculate the statistics
- Most institutions are not sending the total circulation stats for each institution
- Consortial statistics-new software will be very useful
- The directors of libraries who are not sending in their statistics will be contacted.

Use of PINs in MOBIUS Consortial Borrowing:

- No one will use PINs at the Inn-Reach level

Loan Period, Renewals, Maximum Requests:

- Maximum # of requests set at 10
- UG=10
- FAC, Staff, Graduate =20

- Raising the limits affects every borrower
- Restricted courtesy card-no use of Mobius
- Ask cluster to raise # of books for UG
- Ask cluster to increase faculty check-out periods
- Take the maximum # of requests issue back to clusters
- Renewals-1-can have out for 6 weeks (faculty, staff)
- Recalls-ask cluster and institutions
- Only one renewal is allowed since recall will not be available until 2001
- Keep at one until recalled

Other:

- Look at adopting Iliad (ILL managing software-different than CLIO-distributed by OCLC)-(\$7,000) (VDLX-Frontwell-Downing-\$30,000)
- December 1 st next council meeting

Next meeting of the Access Advisory Committee will be Tuesday, January 23 with a snow date of February 6th
Other meeting dates for Access Advisory Committee will be April 24 and July 24.

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