



## MOBIUS ACCESS ADVISORY COMMITTEE

MAAC MINUTES July 25, 2000

**Chairperson: Judy Fox, Washington University**

### MOBIUS ACCESS ADVISORY COMMITTEE MEETING

**July 25, 2000**

Members Present:

Judy Fox, Chair	Washington University
Sharon Upchurch	LANCE (Northeast)
Loretta Ponzar	ARCHWAY
Gordon Johnston	Southeast
Joni Blake	ARTHUR
Amy Arnott	MERLIN
Gary Harris	MCO
Robin Kespohl	MCO
Jim Mulder	Northwest
Denise Pakala	BRIDGES
Gaye Pate	SWAN
Elise Fisher	WILO
Linda Medaris	Central West

The meeting was called to order at the MOBIUS Consortium Office in Columbia. Each person introduced himself or herself.

1. MOBIUS Interlibrary Lending Policy: Now we have an official policy, which is a variation of what we did at the last meeting. The Executive Committee recommends that libraries try using Visiting Patron but it is not required. It is hoped that everyone will because it works so well. So far, everyone is using it. Archway plans to use it. The policy should be placed on the MOBIUS Important Documents page and have a link on the MAAC page. We will review the policy at the end of a year. A copy of the policy has gone out to the directors. Judy Fox will send it to the users list after it gets on the web.
2. Visiting Patron - Procedures and Measurement: We need to have procedures for the libraries that do not participate. We also need to come up with statistical measurement. The system will not prevent you from lending to a person from a library that is not participating. Will have to have a list at Circulation of those libraries who do not participate.

Question of whether a message could be put on the individual patron records. It was decided that would not be possible.

If you do not lend, your patrons cannot borrow - but we cannot guarantee that it will not happen and the library whose patron does borrow is responsible for anything that slips through. It is a local responsibility issue. Judy will draft something and send to us. She will also discuss it with Sarah Cron, MOBIUS Chair.

Measuring the effects of Visiting Patron: Washington University puts green bands on Visiting Patron books. Judy suggested that we come up with a test period to count book bands when they come back or just keep a manual count at circulation. We would be counting items loaned, not people.

Question was asked if we would want to do it for the month of October? We would have to design a reporting form. We could do it once a year until everyone is up.

Robin and Gary will take a closer look at the consortia statistics package that might help.

### 3. MOBIUS Statistics: three issues: format, compliance, and what can we get?

Format: It is difficult to view on the web because you lose the headers. If we make them as PDF documents we would have the rows and headers on each page. However, would only be able to get three or four institutions per page.

Gary will investigate changing the presentation. We are not close to being able to enter our own statistics. Gary said that George was thinking about outsourcing the web pages.

Compliance: In June 31 reported and 23 did not. There are 15-20 libraries that have never reported. MLNC talked to OCLC about management statistics but it would cost \$100 per library. There would also need to be some programming. It would cost over \$5000 a year. It would only do the ILL portion.

We could let the directors know if their library is not reporting - they may assume they are. We could ask Sarah to send a note to the directors.

If anyone has ideas how we can increase compliance or how to present the statistics, please let Judy know. Maybe Sarah would talk at the next Council meeting about why statistics are important.

Judy has added a Total column.

### 4. Campus Use Only: informational item. It has been used in two cases. An example of its use was distributed.

### 5. Lost Book Policy: Merlin wanted it to be up to the lending library if they charged a processing fee. Do they have to charge the \$20 processing fee. The following wording was proposed:

It is up to the discretion of the lending library whether they will accept an exact replacement or the cost of the book.

The question was asked if a patron could approach circulation or acquisition of the lending library directly, instead of keeping it library to library. After discussion the consensus was no, transactions should be kept library to library.

Would there be a refund if the book were later found? It would be up to the discretion of the lending library. Patron returns the book - does it go to the lending library? If the item reappears after payment has been made, it should be returned to the lending library. It is up to the lending library whether or not they will make refunds.

A revised draft of the policy will be posted on the MAAC web page.

### 6. Institutional Loan Rule: There is a problem with the way Merlin and Wash U have it set up now. The Institutional Loan Rule loans for 38 days (to allow for transit time). The Patron loan period is 3 weeks. Visiting Patron falls under the Institutional Loan Rule. OhioLink had III make it the same. It was suggested that we have the loan rules the same.

Joni Blake moved that we change the Institutional Loan Rule to 3 weeks, Elise Fisher seconded. Judy will write up what we want to send to III. Motion passed unanimously. Jim Mulder moved and Denise Pakala seconded

that we have updates of item records as transactions occur on the system. Propose to change it on August 15. Motion passed. If someone comes as a Visiting Patron, they will get 3 weeks loan period instead of 38 days.

The only thing that changes is the Institutional Overdue Report.

Updating - now one renewal is allowed. It does not check the Institutional Loan Rule. Updating changes the due date to the correct date. Without the updating, you can renew something that is 3 weeks overdue for 3 more weeks but it still shows the old due date.

If this is something that is going to be in the next release for InnReach, then we will not need to ask for it. Gary is to find out. If it is not, then Judy will make the request.

7. Advisory Committee Appointment/Elections: Chairs are one year and committee members are 2 years. Members can be re-appointed. The Executive Committee asked us to consider a proposal to base appointments on the fiscal year. The election of the chair would be the first meeting after July 1. MAAC agreed with this suggestion. Committee members would also like to stagger the appointments to provide continuity on the committee.
8. Book Bands: To be used only with patron initiated requests. Wording to be changed when the current supply is depleted. New wording:

**Please return this book to your home library or the lending library by the date stamped below.**

Judy has a template that she will forward to Mark to use in training.

Is there confusion on the To: and From: part? On return of the book, cross out the To: and circle the library name.

Another delivery issue - should one site have extra bags or bins? Just an idea to think about. No action taken.

9. Distribution of MOBIUS reports: Need to figure out how to distribute reports as new clusters come online. When you produce a report on your system, another library needs to get the list to act upon it.

Discussed mechanism, which will work for all MOBIUS. It could be posted to cluster web pages. It would replace what Wash U and Merlin have been doing. These lists are run once a month. Would need to be password protected. Gary is going to make a new page for MOBIUS reports. Each cluster needs to figure out how they will process the reports. Gary offered to do Wash U's reports too.

Judy will look at the reports and suggest who does them. Gary will do the monthly reports on the web.

OhioLink Procedures: handout distributed. Just keep as a reference.

10. Next meeting will be October 31, 2000 in the new MOBIUS headquarters.

11. Update:

ARCHWAY - working on duplicates. Are going to revisit issue of locked scope.

SWAN - not all are online yet. Having trouble getting hardware. August 21 will start patron-initiated borrowing.

Recorded by Linda Medaris