MOBIUS

Linking Missouri's Academic Libraries

February 22, 2000

TO: MOBIUS Council

FROM: MOBIUS Access Advisory Committee

The MOBIUS Access Advisory Committee recommends adoption of the attached Proposal on Interlibrary Lending within MOBIUS although there are concerns about both the visiting patron option and the methods available for limiting requests.

Additional Concerns about Visiting Patron

Some libraries still have concerns about the visiting patron option. Some of these concerns relate to the fact that the visiting patron option was not agreed to in the Memorandum of Understanding. Other concerns are related to liability issues for patrons who visit other libraries or fears of inappropriate use by visiting patrons. Please be aware that individual libraries can deny use by visiting patrons as a policy issue but the visiting patron software is either "on" or "off" for the entire consortium.

Clarification on How Limits Would be Implemented

The InnReach software will only allow a small number of different limits for patron requests. We propose implementing a range of limits. For instance, we could set up the system so a library could limit their patrons to either 10, 20, 30, 40, or 50 requests. In this scenario, UMSL might decide to limit undergraduates to 10 items and faculty and graduate students to 30 items. Washington University might choose to limit its
undergraduates to 20 and its faculty and graduate students to 50. Lincoln University might limit all its patrons to 40. This follows the intent of the proposal to have no MOBIUS imposed limits. Local libraries would be determining to which limit each of their patron categories was mapped.

MOBIUS

Linking Missouri's Academic Libraries

March 2, 2000

PROPOSAL ON INTERLIBRARY LENDING WITHIN MOBIUS--1/26/00

MOBIUS members have three methods of lending materials among institutions. These methods are traditional interlibrary loan, direct patron borrowing through the MOBIUS union catalog, and the visiting patron option of direct
patron borrowing.

TRADITIONAL INTERLIBRARY LOAN

Traditional interlibrary loan is available to all MOBIUS members and covers both returnables and non-returnables. MOBIUS members will not charge each other for these traditional interlibrary loan transactions. Libraries should be encouraged to implement OCLC custom holdings with all MOBIUS OCLC members as one custom holdings group to balance the load. If a MOBIUS library feels that another library is making unreasonable requests, it should contact the library to resolve the problem. Libraries should use Ariel for transmission of articles whenever possible. Borrowing libraries will be responsible for copyright compliance on requests for photocopies.

DIRECT PATRON BORROWING

Direct patron borrowing through the MOBIUS union catalog becomes available to members as their local INNOPAC catalogs are incorporated into the MOBIUS union catalog. Patrons issue online requests for materials in the union catalog and the system determines where to direct the request. Direct patron borrowing in the MOBIUS union catalog is limited to returnable items. MOBIUS members should not charge each other for direct patron borrowing within the MOBIUS union catalog and there should be no MOBIUS imposed limits to the number of requests that a patron can
initiate. The MOBIUS Access Advisory Committee will monitor the lending statistics and adjust the request balancing table to spread the load as evenly as possible.

VISITING PATRON OPTION

The Visiting Patron option of MOBIUS direct patron borrowing allows a patron to visit another MOBIUS institution and check out materials. It is only available when both the lending library and the patron's library are participating in MOBIUS direct patron borrowing. The INN-Reach system verifies the patron in his local cluster patron file. Borrowing using the Visiting Patron option falls outside the load leveling capabilities of the system. Implementation of the visiting patron option is recommended but is a local library policy decision. If a library feels the patrons of
another MOBIUS library are abusing this privilege, it should contact the library to resolve the problem.

LOCAL LIMITS

Each library determines whether it wants to limit the number of traditional interlibrary loan or patron initiated requests its patrons can make. Limits on patron initiated requests (both through the system and using the visiting patron option) are handled by the loan rules in the local cluster system.

RESPONSIBILITY FOR LOST OR DAMAGED MATERIALS

The patron's home library is responsible for any books provided by another MOBIUS member institution until they are received by the lending library. The MOBIUS Access Advisory Committee will recommend a reimbursement method
for lost or damaged materials.

STATISTICS

Statistics will be kept for traditional ILL and direct/visiting patron borrowing. These statistics will be used as part of a review of this policy which will take place 1 year after its adoption and annually thereafter.