

Resource Sharing Committee

8/22/2022 - Virtual Meeting

IN ATTENDANCE: Jeanne Buck (chair), Laurie Shedrick (MHLS), Gillian Murphy, Darren Lanspery, Wendy Tremper Wollerton, Tammy Gaskell, Rhiannon Leo-Jameson, Carol Bancroft Kimberly Benjamin, Dede Farabaugh

MINUTES: Motion to approve made by Jeanne Buck, seconded by Wendy Tremper, Passed unanimously.

OVERDRIVE \$10 BLOCK: Should we keep the \$10 block on OverDrive items? All agreed that we leave the \$10 block for patrons checking out and placing holds in OverDrive. No vote required as the policy is not changed.

MANAGING SUPPRESSED ITEMS: Laurie Shedrick noted that there are nearly 100,000 suppressed items in our shared collection. MHLS does not currently delete the item records of member libraries without approval. Any global deletion of records by MHLS would require DA approved policy. MHLS Staff will provide libraries with a list of their items with suppressed status and ask that they check their shelves for these items. Any items found should be checked in to change the status and the Annual Report field should be edited to an unsuppressed value. The library can then request that remaining items be deleted.

If this doesn't work, we will need to come up with a "global" solution to reduce the number of suppressed items in our collection.

DELETING EXPIRE PATRONS WITH FEES: Question, "Can a library delete expired patrons who owe money to other libraries?" There is not an individual policy that deals with this question.

ACTION ITEM: Amended MHLS policy (Resource Sharing Standards) to include deleting patrons who are expired for 3 years and owe more than \$10 in fine/fees/charges (replacement, adjustment, lost book, overdue renewal, manual and/or overdue fees) that are over seven years old. MHLS will add deleting patron records which are expired 3 years and have owe fines/fees/charges that are older than 7 years. Motion to update the procedure Jeanne, Wendy seconded, unanimously passed.

FINES POLICY REVIEW: What fines can be waived by whom? Concerned that we may encourage patrons to return items at fine-free libraries if those fines are waived. Discussion ensued regarding possible solutions.

ACTION ITEM: *If a \$10 fine is collected on behalf of any one library in a single payment transaction, payment must be sent to the library owed.*

Change to: Libraries should not waive fines on items checked out at other libraries except during formally declared period of amnesty.

Procedure: The library director will email techsupport@midhudson.org, and the amnesty will be published in the MHLS notices.

Laurie Shedrick updated the committee on Vega developments.

- Patron circulation notice options
- Carousels on the main page
- Vega connect slated to be available to consortia in Q1 of 2023

Most issues have been cleared except for paging priority which is required development for MHLS release

Motion to adjourn made by Jeanne Buck, seconded by Tamara Gaskell ended 11:36 am.

Action Items for DA Agenda attachment: 9/16/22 DA meeting

Deleting expired patrons with fees

Background: Patron records that have been expired for more than 3 years and have less than \$10 in fines are currently deleted by MHLS annually. Patrons owing more than \$10 remain in the system indefinitely, or until the library deletes them.

Issue: Libraries may not remove patrons if fines, fees or replacement costs owed to other libraries exist. The debt after 7 years is considered bad debt and likely not retrievable, therefore. MHLS could expand the annual patron deletion to include patrons with debt over 7 years old.

Recommendation: MHLS will add deleting patrons who expired 3 years and owe fines/fees/charges that are older than 7 years.

Status: Discussed at Resource Sharing Advisory Committee on 8/22/22 & presented to DA for September 16th meeting

Effective Date: Upon approval, to be completed in the 2023 cycles and thereafter.

Waiving fines from other libraries

Background: The resource sharing standards for waiving fines needed had not been updated since 2009 and cited changes to process that were no longer relevant to cite.

Issue: Libraries were unclear about being able to waive fines incurred at other libraries particularly during amnesty campaigns.

Recommendation: Update the current policy with clear and current language that allows member libraries to waive fines on returned items during amnesty, regardless of where the item was checked out.

Current Policy:

Libraries should not waive fines on items checked out at other libraries. Because we use the loan rules of the checkout agency it is no longer necessary for "Free" libraries to use the 'Waive Fines' button in check-in.

~Approved by Directors Association 2/5/09

Proposed Policy:

Libraries should not waive fines on items checked out at other libraries except during formally declared period of amnesty. In that period, overdue and overdue renewal fines may be waived on returned items.

Procedure: The library director will email techsupport@midhudson.org, and the amnesty will be published in the MHLS notices.

Status: Discussed at Resource Sharing Advisory Committee on 8/22/22 & presented to DA for September 16th meeting

Effective Date: Upon approval

Collecting Fines from other libraries

Background: Further clarity is needed in the policy regarding collecting fines incurred at other libraries

Issue: The language in the previous statement did not refer to specific charge types, which left ambiguity for staff.

Recommendation: update the policy for clarity regarding charge types

Current Policy:

- A. If \$25 or more is owed to any one library, payment must be sent to the owning library.
- B. All libraries in the Mid-Hudson Library System, including fine free libraries, may collect fines that have accrued from transactions that have taken place in other member libraries. ~Approved by Directors Association 6/14/22

Proposed Policy:

- A. If \$10 or more in Overdue Fines, Overdue Renewals or Manual Charges is collected on behalf of any one library in a single payment transaction per patron record, payment must be sent to the library owed. Replacement, Adjustment and Lost items payments collected must be sent to the owning library, regardless of the amount collected.

Section B remains unchanged.

Status: Discussed at Resource Sharing Advisory Committee on 8/22/22 & presented to DA for September 16th meeting

Effective Date: Upon approval