

## Resource Sharing Working Group (RSWG)

### Minutes of Meeting held at NOBLE, April 29, 2013, 2:00 p.m.

The committee continued to consider the Long Overdue/Billing Process in Evergreen, a major issue the group was charged to address. RSWG's previous meeting on 3/4 resulted in a recommendation for consideration at subsequent meetings of the Executive Board and the Members.

Following those meetings, Ron's email to RSWG, dated 4/24/2013, stated that "proposed long overdue and billing changes for Evergreen" met no final conclusion after the recent Members meeting. At this Monday's RSWG meeting, the committee extensively reviewed and discussed Ron's email, which presented an expanded proposal. Ron was unable to attend the RSWG meeting because of a commitment to interviewing candidates at MBLC.

Elizabeth explained that the need for a newly crafted method of long overdues process and the subsequent work required arises because NOBLE do not want to use Evergreen as it is "because it is problematic." According to the current functions of Evergreen, once a bill is sent, the patron must pay; and when an item is returned, the patron is to be refunded.

Elizabeth reported that these issues resulted in interesting discussion at the Members meeting concerning the issues of 1. Evergreen vs. Millennium (how things were done then); 2. the different needs of academic and public libraries; 3. that concept as well as verbiage is relevant; and 4. that more work needs to be done to address the problems, even though a lot has been done.

Some RSWG members asked for an explanation of the difference between the meetings of Executive Board and Members.

RSWG members determined it was best for their committee to consider the concepts outlined in Ron's e-mail, which proposed the following 4-tiered communication to patrons with overdue items:

1. "At least one pre-overdue notice will be sent via email three to five days in advance of a due date to remind users that their time of use ending is near and so that users can either renew the materials or make other arrangements."

***RSWG members agreed with this procedure, which is currently in place. Several circulation staff commented that their patrons have responded positively to this reminder.***

2. "At least one overdue (email and/or print) reminder will be sent approximately a week after the due date to remind the user of the ending of the current loan period and urging renewal or return."

***RSWG members agreed with the concept and timing of this notice. Some circulation staff from public libraries expressed concern that their cities or towns would not wish to pay for postage for hard copy mail of this volume.***

3. "A long overdue notice, email and print, will be sent at six weeks overdue which will block further borrowing, renewal and holds placing. Renewals can be overridden by staff in the library if deemed appropriate for that library's materials only."

***Some RSWG members expressed concern that this notice has no costs attached to the items, and thereby giving not enough information to patrons in the event that the items are lost so that patrons may reconcile their accounts, given that their privileges are being suspended with this notice. This notice would include an email reminder as well as a postal hard copy.***

4. "A bill (print and email) will be sent at six months overdue for the cost of the materials in the system. A listing of these materials will be sent to the owning library a month in advance so that the library can verify and update the cost in the record before the bill is sent."

***Although RSWG academic representatives at RSWG see six months as far too long, public representatives also see this time period as too long to wait for a bill to be sent. In general, circulation staff expressed great concern about the vast numbers of materials that are long overdue with no bills generated for nearly a year now, while libraries are struggling economically. The committee believes that the concept and schedule of a fourth notice protracts the process.***

Ron's email further stated, "Member colleges may opt to have their faculty and students exempted from long overdue blocks for items owned by their institution; blocks resulting from long overdue items owned by other NOBLE libraries will be placed and honored." There was additional discussion expressed about the overdues schedule, Evergreen functionality, and actual policy. Specific examples of concern for circulation staff include that the system will not show that an item is charged out to the patron, but that the patron has nothing out, has lost items, and owes money. There was also concern expressed about the Evergreen feature that has the lending (rather than the owning) library send notices and for the cumbersome process that the owning library verify prices prior to bill sending. This is a major change from the Millennium model.

**RSWG members agreed that the third and fourth notices should be consolidated into one bill notice that serves to advise patrons that privileges are suspended AND lists costs so that patrons know the prices of items, if they have lost and therefore must pay for them. The committee unanimously remains committed to its original proposal to send one final bill notice advising that borrowing privileges are suspended and listing costs for materials.**

The next meeting of the Resource Sharing Working Group will be held at NOBLE on Monday, June 24, at 2:00 p.m.

Submitted by Louise Bevilacqua, Northern Essex Community College