Public Services Council Meeting of April 27, 2021

Attendees: Ann Glusker, Mark Marrow, Patrick Shannon, Scott Peterson, Nicole Brown, Jami Smith, Blake Lindsey, Neda Salem, Kristen Greenland, Ellen Dario, Susan McElrath, Lynne Grigsby, Dave Wong, Beth Dupuis, Salwa Ismail.

Agenda and Notes:
Public Services recommendations related to SILS. UCB SILS Fulfillment and Resource Sharing team has been working on configuration and testing. Existing practices and policies could transfer over or we could consider reviewing and changing some. Input from PSC will be considered along with input from other groups.

- <u>Loan periods for undergraduates and staff</u>
  Brief: The UC Libraries have agreed to a 90 day loan period for all items lent between campuses for all patrons via the SILS Automated Fulfillment Network (AFN). Currently, Berkeley loans Berkeley-owned items for 30 days to undergraduates and staff (also we have 90 day loans for graduate students and 180 day loans for faculty) which would mean that a Berkeley undergrad would get a Berkeley item for 30 days but an item from another campus for 90 days. This policy change allows our users the same loan periods for our items as for other UC Libraries' collections they may borrow.
  <u>Decision</u>: Library Cabinet has agreed to change the borrower privileges so that Berkeley or Berkeley-affiliated populations currently with 30 day loan periods for UCB-owned items will have 90 day loan periods.
  <u>Discussion</u>: Decision has been made, no changes.

- <u>Auto-renewals for patrons</u>
  Brief: Currently Berkeley does not have an auto-renewal feature. Users must return or renew their items at each due date even if no other patron has requested them. Changing this practice could relieve a burden for patrons. They will need to return items at the end of the system's borrowing period which is 360 days. This is a completely new approach for us so we propose implementing it for UCB monographs and for the UC Berkeley campus community only. We can assess how it is working and later expand to other item types or other patron groups, or can terminate the auto-renewal altogether if needed.
  <u>Recommendation</u>: Turn on auto-renewals for monographs without holds to be renewed for all UC Berkeley students, faculty, staff, and related titles (not activated for community borrowers; they could still renew online if they wished). The system would send a notification to patrons that their items have a new due date.
  <u>Discussion</u>: Change is being proposed to existing practice with this feature offered in Alma. Will users be getting emails that the item is being auto-

renewed? Yes, the user will get notifications for auto-renewals and also if something is not being auto-renewed due to some other reasons(max limit reached, block, etc.). Some users feel they get too many emails from the Library now. The Library does not send out a lot of notices, only 4: courtesy, overdue, blocking, and bills. If users have a lot of books checked out then they get a lot of emails. Users might have concerns if they cannot renew it past 360 days. That is a current practice right now. Public services staff will have to do some education around users to explain the process to users. User communication around how to look at their Library accounts. Consider taking enhanced communications steps. There might be concerns around auto-renewing it for users who keep items for a long time. ILL materials should not be auto-renewed and that issue has already been addressed. In the notification message, we suggest including the information of the materials checked out (we believe the information is already there in Alma's email template). There is no button that can be included in the notification message. It is possible to leave this service as-is, and not make any changes. This change would be super helpful for undergraduate students. Auto-renewals would be helpful for users who don't have internet access if they have left the country or don't have access. General consensus from most members was to keep auto-renewals + educating more around the use of the user Library Account.

- Recall periods
  Brief: Currently Berkeley patrons have 7 days to return a recalled item. A slightly longer period may give them time to finish with the item before relinquishing it to another person.
  Recommendation: Extend the recall period to 14 days.
  Discussion: 14 days seem a bit long given that 7 days is also problematic for most users right now. We now have AFN (Automated Fulfillment Network, UC-wide resource sharing), users can submit a resource sharing request and get the item if it's checked out at Berkeley but available on another campus. Maybe consider a shorter period if it is being recalled for reserves. In that case, staff can override the due date and shorten the due date to an appropriate time as is the current practice. With longer loan periods and auto-renewal, we might be seeing more recalls too. For 7 days, we have free scanning, so users can scan within the 7 days. But 14 days might be too long for users to wait for their assignments. For those traveling, 14 days may be needed. There was a concern about fairness. 7 days would be fair so that more users can access materials. 2 weeks may be too long for patrons who are waiting for the returned materials. General consensus was that 14 days was too long and to keep to 7 days.

- Berkeley collections available through AFN
  Brief: The new SILS makes it easier for patrons from UC Libraries to access a copy of an item. First, the system looks for a copy on that campus. If one is not available, it will directly request a copy from another of the UC Libraries via the Automated Fulfillment Network (AFN). Berkeley can choose which of our item

types to make available through the AFN. We are making monographs available through the AFN which has a 90 day loan for all items for all patrons. Currently, most other serials are available for Berkeley patrons to check out for very short periods (hours or days, if they are not building use only). Because volumes of serials would be much harder to replace and the loan periods via the AFN are so long, it seems desirable to keep these on campus.

Recommendations:

- Include serials at NRLF as requestable via the AFN

- Include UCB multi-volume monographs shelved on campus (cataloged as monographs - regular loan and as serials - other loan) as requestable via the AFN

- Exclude UCB other serials shelved on campus (cataloged as serials - regular loan) as requestable via the AFN.

Discussion: AFN is set up with 1 user (network) and 1 loan period (90 days); there are no other choices. It has already been agreed that campuses will loan monographs and that NRLF will loan all unrestricted items. Campuses can decide if they want to loan other material types other than monographs. Currently, most of our serials are 7 days or non-circulating. If someone from another campus requests a digitized article, it goes to the owning library (eg. engineering serial will go to the engineering library for them to pull), then engineering will route that item to ILL to fulfill the request. General consensus - ok to proceed with recommendations.

- **Courtesy notification process for due dates, overdues, and billing**

Brief: Currently Berkeley patrons receive a series of notifications over a 30 day period if they have an item coming due: one before it is due with encouragement to renew or return it, one when it is due to return it, one when the item is considered lost and billed for replacement (replacement fee is cleared if returned, though the processing fee remains).

Recommendation: Retain the current settings.

Discussion: As a reminder, users get the first notice before the due date, then users get an overdue notice 1 week after the due date and 2nd overdue notice 15 days after informing them about being blocked and coming up for billing. And 30 days from the original due date, users will get a bill.

- **Reserves loan periods**

Brief: Currently Berkeley has four variations for 2 hour print reserve loan periods including combinations of (non)/renewable and (non)overnight. We are striving to reduce the number of variations for loan periods in our systems which will clarify things for patrons and our staff.

Revised recommendation: Offer two loan options: 2 hour loans with overnight, and 2 hour loans without overnight.

Discussion: There are several libraries that have overnight users, and it's essential for those users to have overnight access. Alternately Moffitt is 24 hours and needs an option without overnight. How would a hold on reserves items

work? We currently have holds on reserves in Millennium and it's mostly used in Moffitt. In Alma, terms of use can be set up with a 2 hour loan that can be requested (put a hold). The issue with short term items will be problematic depending on how frequently notices go out; perhaps short term loans should not allow holds and not be renewable, with some period of time programmed in the system before the person can recheck it out (15-30 minutes?). The Access Advisory Group could look into this further.

FYI, these are all the current loan periods for reserves in Millennium:
1. 2-hour renewal/overnight
2. 2-hour renewal/no overnight
3. 2-hour no renewal/overnight
4. 2-hour no renewal/no overnight
5. 1-day renewal
6. 1-day no renewal
7. 1-week renewal
8. 1-semester no renewal

- Patron blocks to accounts due to fines

  Brief: Currently Berkeley patrons (other than faculty) with $50+ in fines have a block on their borrowing privileges. This generally means up to five processing fees or one item billed for replacement. The Library does not charge daily fines for items except reserve-type items since those are needed by a group of patrons and have short term loans (keeping something beyond the loan period in that case negatively affects other patrons.) Once the patron returns the item or pays the fines on their account the block is lifted. The Library has a substantial number of patrons with fines/fees and this limit helps ensure they address it before it gets too large. Recommendation: Retain the current settings.

  Discussion: No changes

  All other discussion items had garnered no new changes/feedback.

  An item raised for discussion was around new books and if there is a way to stop circulating them to other UC Libraries for an initial period of time. This is not possible unless those items are in a special location. This has to be a location that is physically separate from other locations, so those items will follow this rule. This has to be a decision for all libraries (each individual library cannot have a different option) and with consideration of the staffing and workflow implications. Beth will take this issue to Jo Anne Newyear-Ramirez for further consideration from the collections groups.