From Traditional Loans to Autorenewals

Converting from traditional loans, renewals and holds to autorenewals and hold recalls

★ Background, options, and benefits
★ Problems, pitfalls, and surprises

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with
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We'll renew for you!
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YOUR LIBRARY

LEEDS BECKETT UNIVERSITY

INVESTORS IN PEOPLE Gold

CUSTOMER SERVICE EXCELLENCE CSE
Leeds Beckett Library

- 2 Campus Libraries
- 139 staff
- 350,000 items
- 795,000 transactions
- 90% via self-service

- Open 24 / 7 / 365
- 1.3 million visits
Background

★ Students’ Union Request
   ○ “No more fines” in President’s manifesto
★ From staff visits to other Unis, aware of trend
★ Financial implications - could we afford to lose income?
★ Weigh off against service improvement benefits
★ Needed senior management sign-off
Options
★ Benchmarked 19 UK Unis using “no-fine” model – mostly on autorenewal (and mostly Alma!)

Considered 2 main options
★ Autorenewals
  ○ Need for autorenewal custom report – cost! ($700)
  ○ “We’ll renew it for you (unless it’s been recalled)"
★ Much longer loans
  ○ Possible with standard Symphony options
  ○ “Keep it for longer (unless it’s recalled)”
Option Chosen

➤ Autorenewals (weekly)

★★ Message more dynamic - “we’ll renew it for you” vs “we’ll just let you keep it longer”
★★ Not really comfortable with “you can have these things a REALLY LONG TIME”
★★ A lot more sites operating weekly autorenewals than anything else - so plenty of sources of advice on policy, publicity, pros and cons, etc.
Benefits

★★ Library-student relationship (You said – we did)
  ○ (and staff get benefits as well…)
★★ Improved stock circulation
★★ Books “in demand” circulate more
★★ Not waiting as long for holds
★★ Reduction in unnecessary fines – only fine when book is wanted
  ○ but fines much bigger - £2/day instead of 20p!
Risk(s)

Huge reconfiguration of entire lending model!

... and not easily reversible

Short timescale
Implementation

★ Started well in advance – lots of planning
★ Complete revision of:
  ○ Circulation Map
  ○ Underdue/Overdue notices
★ Test server – trialled as best we could with non-live data
★ Lots of liaison with Lending teams
  ○ They performed trial issues, holds and returns mimicking as many scenarios as possible - first on test server, then on live
Implementation

★ New Circ Rule names begin A- so easy to spot
★ Unseen Renewal count used to limit renewals (26 for students, 52 for staff, 10 for guests)
★ Renewals set to be from Due Date (not date of renewal as before)
★ … and limited to only day before due
★ autorenewal reports run at 0:50, so effectively less than an hour when self-renewals possible
★ but then eLibrary config changed to no self-renewal anyway!
Implementation - Circ Rules

Name: 2W-1W-5-ST
Description: 2 week loan, 1 week alt loan, 20 renewal, standard
Loan period: 2-WEEKS
Billing structure: STANDARD
Renew limit: 20
Unseen renew limit: UNLIMITED
Renew from: ○ Due date ○ Date of renewal
unseen renewals within this number of days before due date: 0 [Loanable]
Maximum loans: 25
Grace periods are in ○ Days ○ Hours ○ Minutes
Grace periods 0 [Overridable] Days
Recall grace period 0 [Overridable] Days
Recall loan period: UNLIMITED
Alternative loan period: 1-WEEK
Save loan history

Name: A-HE-ST
Description: Autorenew, HE undergraduate, Standard
Loan period: 1-WEEK
Billing structure: AUTORENEW
Unseen renew limit: UNLIMITED
Due date ○ Date of renewal
1 [Loanable]
Maximum loans: 25
Grace periods are in ○ Days ○ Hours ○ Minutes
Grace periods 0 Days
Recall grace period 7 Days
Recall loan period: 1-WEEK
Alternative loan period: 1-WEEK
Save loan history
Implementation - custom report

Adjustments made by SD in contract testing period:
★ Does not send notices
★ Override so holds on items don’t block renewal

We added:
★ User Standing entry to allow renewals for BARRED users (so items still autorenew regardless of user status)
Publicity
★ Blogs, lots of revision of webpages, displays, etc!

We'll renew for you! Changes to renewals and fines for 2017

We're always working hard to make it as easy as possible for you to get the resources you need and help make using the Library as easy as possible. For 2017 we've made some changes to the way resources are renewed and fines charged:

- We'll renew for you so you don't need to (excluding Laptop Loans, Short Loans and automatic renewal of Interlibrary Loans).
- We'll keep renewing for up to 6 months unless someone else needs the item or you finish your course.
- We'll email your University email account to tell you if you need to return your items.
- You'll need to return requested items within 7 days. Offsite students and those with disabilities have slightly different arrangements – see their web pages for more information.
- Fines have increased slightly. However, if you want to borrow something that's already on loan and need the item, you can put a Hold on it so that it is recalled.

If you want it, request it!

We introduced our new automatic renewal system in October, meaning we'll keep renewing for up to 6 months unless someone else needs the item or you finish your course. So if you want to borrow something that's already on loan and need the item, you can put a Hold on it.

But what happens when you place a hold on something?

If the item is already on loan an email is sent to the University email of the person who has it asking them to return the item, as it has been requested by another user. They then have 7 days to return the item (Offsite students and those with disabilities have slightly different arrangements – see their web pages for more information).

We'll renew for you! Changes to renewals and fines for 2017
We're always working hard to make it as easy as possible for you to get the resources you need and help make using the Library as easy as possible. For 2017 we've made some changes to...
Problems

★ Initially, Holds made on catalogue didn’t generate Recalls

★ We hadn’t noticed an eLibrary config option:
  ○ `HOLD_RECALL_STATUS|2|` # instead of 1
    (1 = No Recall, 2 = Standard Recall)

★ Overdue vs Recall vs Assumedlost notice reports
  ○ Overdue can masquerade as Recall
  ○ Assumedlost raises LOST bill & sets LOST-ASSUM, but can’t include Recall Date Due on notice
Problems

Accidentally misconfigured some reports:

★ Initially, some recalls were being re-sent every day for a week
  ➢ misconfigured date limits!

★ Recently, have found some items not receiving Assumed Lost bills or Invoices
  ➢ current location left at ON-LOAN instead of LOST-ASSUM
Problems - due date display

★ People were confused by due dates a week away when we were saying they could keep items for 6 or 12 months.

★ Recall due dates set at 7 days from Recall
  ○ Not the same as regular Due Date
  ○ But Overdue status based on regular Due Date

★ Resolved by removing due dates from the Catalogue display.

★ (And pre-existing customization does correct colour-coding for imminent due date!)
Problems - 3-week Recall

★ For some users, items have an initial non-recall period of 3 weeks but are auto-renewed weekly
  ○ Initial issue period also determines renewal interval
  ○ So weekly auto-renewal requires initial issue period of 1 week as well
  ○ causing confusion between 1-week/3-week periods

★ Custom report:
  ○ runs each morning
  ○ adjusts due date for items issued the day before under Circ rules requiring 3-week initial loan
Problems - Books by Mail

★ Hold Recall report generating MRUL not loaded errors
★ Fails to Recall items that were issued using a Mailing Rule
➤ Known Bug - UNI-29897

➤ Our Offsite service staff run a report periodically to list affected items and place a proxy hold not involving a mailing service!
Surprises!

Recall Overdues fined differently from regular ones
★ Not levied until end of period (day), not beginning.
★ E.g. book due on Wednesday not fined until end of Thursday, instead of first thing Thursday
★ Effectively an additional day’s grace
➤ Fixed in 3.5.3.1? - UNI-29897

Hold Recall report doesn’t send notices - need additional Recall Notice report
Surprise Problems!

★ Handling of Recalls in our environment
  ○ Using title-level holds so that first copy returned fills hold
  ○ Holds of on-shelf items allowed
★ To keep title-level holds, need to use Hold Recall Without Modifying Hold Level report (NOT plain Hold Recall)
★ Multiple consequences - interesting, questionable and problematic!
Surprise Problems - Recalls

★ If there are multiple holds on a title, and at least one is filled by an on-shelf copy, recalls for other holds are not generated the same day.

★ If a copy which hadn’t been recalled is returned:
  ➤ it’s trapped to fill the hold (correct)
  ➤ the hold is cancelled (correct)
  ➤ but the count of Recall notices sent for the outstanding recalled item is not reset to zero (oops!)
  ➤ item can be recalled again (correct)
  ➤ but no Recall notice can be sent (oops!)
* Recalled holds expiring, cancel recall items - not recalled + on loan
  but recall notices > 0
  → reset # recall notices
  → calc. new due date & # renewals

* Initial loan period 3 weeks not shown
items - issued yesterday
  & circ rule 13, recall loan period = 3 weeks
  → set due date 3 weeks away
  or # unseens to 2
  + # seens to 2
  + plausible renewal date

Assum - lost
no recall date
but recall notices > 0
due about 3-4 weeks ago
→ send invoice!
Where are we now?

★ Now 9 months since launch
★ Has generally operated smoothly from day 1
  ○ (with caveats already mentioned!)
★ Negligible level of complaints
★ About to review before heading into new academic year
★ Not anticipating any huge change - maybe some tweaking to harmonise students and staff on a 12-month limit?
A few facts and figures...

<table>
<thead>
<tr>
<th>BILLS</th>
<th>Jan-Jun 2017</th>
<th>Jan-Jun 2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid</td>
<td>£25,416.26</td>
<td>£4,816.16</td>
<td>-81.1%</td>
</tr>
<tr>
<td>WAIVED</td>
<td>£9,008.21</td>
<td>£5,360.50</td>
<td>-40.5%</td>
</tr>
<tr>
<td>CANCELLED</td>
<td>£104,743.99</td>
<td>£77,039.57</td>
<td>-26.4%</td>
</tr>
</tbody>
</table>

-81%!!!
Waiving a greater proportion - leniency for users unfamiliar with a new system?
Lesser reduction in Cancellations unsurprising - mostly replacement charge being rescinded when assumed lost items returned
A few facts and figures...

<table>
<thead>
<tr>
<th>HOLDS</th>
<th>Nov 2016 - Jun 2017</th>
<th>% of Placed 16-17</th>
<th>Nov 2017 - Jun 2018</th>
<th>% of Placed 17-18 Change 2017-&gt;2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placed</td>
<td>16,530</td>
<td>13,284</td>
<td>-19.6%</td>
<td></td>
</tr>
<tr>
<td>Filled</td>
<td>11,217</td>
<td>8,759</td>
<td>66%</td>
<td>-21.9%</td>
</tr>
<tr>
<td>Exp. on Shelf</td>
<td>3,642</td>
<td>3,160</td>
<td>24%</td>
<td>-13.2%</td>
</tr>
</tbody>
</table>

★ Fewer Holds is a surprise - had anticipated an increase because of “If you want it, reserve it”!
★ Going to rename Holds as Reservations

★ On the other hand...

<table>
<thead>
<tr>
<th>LOANS</th>
<th>Nov 2016 - Jun 2017</th>
<th>Nov 2017 - Jun 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>155,098</td>
<td>135,715</td>
<td></td>
</tr>
</tbody>
</table>
Any regrets?

No, not really…

★ Has worked well and achieved objectives
★ Very positive reaction from users

From a technical point of view:
★ Long loan period (6 or 12 months or more) would be much easier to implement, with fewer oddities to work around!
Any Questions?

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