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12-14-98 - agenda

**DALNET Collection Access Committee  
December 14, 1998 Minutes Unapproved  
Purdy / Kresge Library, Wayne State University**

Present: Paul Beavers: WSU, Gerald Bosler: MCC, Anaclare Evans: DALNET Systems, Jim Flaherty: WCC, Tom Lewandowski: OCC, George Libbey: UD-M.  
Not Attending: David Murphy: WA, Nancy Skowronski: DPL.

**DALNET Circulation Privileges: WSU Pilot Project**

The WSU Pilot Project will be considered a DALNET initiative among its academic library members in support of creating the information hub. P. Beavers presented a draft entitled, "Reciprocal borrowing Agreement Between DALNET Academic Libraries. Suggestions were made to make the Agreement more specific:

1. The DALNET academic libraries that are participating in the agreement will be listed.
2. Registered students and current staff will be stipulated in the Agreement.
3. Students will not be allowed to borrow from a reciprocating library if they have a block at their home institution.
4. Borrowing privileges to registered students and current staff will be extended for a semester at a time with a discretionary, buffer period at the end of the semester.
5. Specific borrowing privileges will be stipulated: 3 items, 21-28 days, no renewal, immediate recall.

Additional suggestion were made as to the public relations communications that will be necessary to implement this service. It must be clear that this is an DALNET Academic Library Agreement. Special libraries are not included in this agreement and cannot participate because it is contrary to their mission, e.g. Beaumont Hospitals and the Detroit Institution of Arts. In addition, the staff members at the respective participating libraries must be informed on how to implement this agreement in a uniform manner.

Infopass will remain as an access tool for SEMLOL libraries e.g. Detroit Public Library, University of Michigan-Dearborn, Schoolcraft College, Madonna University, Henry Ford Community College. DALNET libraries may continue to send their students to WSU with Infopasses when they wish to borrow materials from the Medical and Law Libraries. The WSU Reuther Archives shall be considered a special library.

A suggestion was made about highlighting abusive patrons with notes on the patron records and not extending chronic, abusive patrons reciprocal privileges. The NOTIS Circulation System allows notes to be made in the patron record. These notes can be institution specific or system wide. The Horizon system should be similar. However, there remain unanswered legal questions about sharing patron information among DALNET members, especially if the result is to negatively affect the patron. A question was raised about providing a guarantee that a reciprocal borrower is in good standing before extending borrowing privileges. The good standing of a patron revolves around whether that individual has any current blocks or holds on his/her patron record. Each library has the ability to decide if they would like to extend borrowing privileges to a reciprocal patron based on the information in the patron record.

The shared borrower file remains an issue to be solved both technologically and legally. Shared data about patrons and statistics generated from circulation transactions require more planning and programming before they will be made available on Horizon. However, if comparative statistics are to be made available, a standardized borrower type (e.g. recip) must be used at each institution. The standardized borrower type must be agreed upon by DALNET members and inserted in the circulation tables at each institution. It was noted that the success of the pilot project will depend on how onerous it is for each institution to use Horizon in offering the reciprocal service. If the shared patron database is

easy to use for authenticating patrons and generating comparative statistics, circulation staff members at each institution will be more inclined to make the pilot project a permanent service among DALNET libraries.

Before the Reciprocal Borrowing Agreement can be implemented approval of the agreement must be given by: the WSU Circulation Heads, the WSU Unit Heads / Executive Committee and the DALNET Board

## **II. Interlibrary Loan Privileges**

Committee members considered DALNET interlibrary loan privileges in light of the new RSS module that will be available on Horizon. The Interlibrary Loan Task Force is meeting on December 21. The Collection Access Committee expects to liaison with the ILL Task Force in creating a DALNET ILL Access Agreement. It was noted that WSU may have already implemented its reduced ILL fee policy to DALNET libraries. Confirmation of implementation of the new policy is being sought before publicizing the improved pricing.

P. Beavers noted that WSU was not recommending that DALNET libraries implement the OCLC IFM program. However, as part of its new pricing policy to DALNET libraries for ILL services, WSU is waiving the fee for not belonging to OCLC IFM. The OCLC IFM program is advantageous if a library is a net lender. If a library is a net borrower the IFM module can expedite ILL service, but the financial advantage is lost. Bosler noted that committee members will be interested to find out whether the Horizon RSS module will interface with the OCLC IFM program as well as DocLine.

## **III. DALNET Access Directory**

J. Gilbert inquired as to whether the DALNET Access Directory will be revised since it is out of date and her library would like to make some revisions. Bosler noted that the committee is committed to updating the Directory information on a DALNET Web page. This is an ongoing project which will require some time.

## **IV. NOTIS / Horizon Statistics**

Committee members were asked if they wanted to identify any useful historic statistics before WSU and DPL migrate from NOTIS to Horizon. Committee members took the question under advisement since standardized data may be difficult to obtain.

Respectfully submitted,  
J. Bosler

**DRAFT**  
**RECIPROCAL BORROWING AGREEMENT**  
**BETWEEN DALNET ACADEMIC LIBRARIES**

**REVISIONS RECOMMENDED BY WSU LIBRARIES**

The purpose of this Reciprocal Borrowing Agreement is to allow participating academic libraries within the Detroit Area Library Network\* (DALNET) to expand their users' access to library resources.

This Agreement reference to: (1) the home library, which is the library directly associated with users who are registered students or who are current staff members of the home institution, and (2) the reciprocating library, which is the library that is offering a guest borrowing privilege based on the stipulations designated in this agreement.

The following are the policies under which the participating libraries will accord borrowing privileges to users from another academic institution:

1. An institution adopting this agreement agrees to provide borrowing privileges to the students and staff of another DALNET academic institution. All participating institutions will provide each other with timely notification of any changes in local policy that may affect the operation of the agreement.
2. The privileges to be extended to guest borrowers from DALNET Academic Libraries are the following.
  - A. Three items may be charged out from the reciprocating library at a time.
  - B. Items--unless other restrictions apply--will be charged to DALNET guest borrowers for the period that the reciprocating library sets for its student borrowers.
  - C. Charged items cannot be renewed.
  - D. Charged items are subject to immediate recall.
  - E. Items will not be charged to DALNET guest borrowers whose privileges are blocked at their home institutions.
  - F. Borrowing privileges will be extended to DALNET guest borrowers until the end of the reciprocating institution's term plus a discretionary buffer period.

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\* For the purposes of this agreement the DALNET academic libraries are held to be Macomb Community College, Oakland Community College, University of Detroit Mercy, Walsh College, Wayne County Community College, and Wayne State University.

3. The privileges extended to guest borrowers from DALNET Academic Libraries may differ from those extended to the reciprocating library's primary clientele or to other types of guest borrowers at the reciprocating library. DALNET guest borrowing privileges can be restricted to specific portions of the reciprocating library's collections.
  - A. Each reciprocating library will provide the DALNET Board with a written statement detailing the limitations it places on DALNET guest borrowing privileges. Such a statement might, for example, state that DALNET guest privileges cannot be used to check out certain classes of materials (e.g., nonbook materials, videotapes, software) or materials from certain collections within the library (e.g., reserve materials or materials in the Dental Library).
  - B. Users entitled to DALNET guest borrowing privileges may have additional and different access to the reciprocating library's collections through other agreements. Some users will, for example, chose to borrow materials through SEMLOL InfoPass or MichCard or by purchasing more comprehensive guest borrowing privileges.
4. A user wishing to borrow materials must be a currently enrolled student or staff member at the home institution. The DALNET patron records will be consulted in order to establish current enrollment or employment. In order to be issued or to renew a DALNET guest-borrowing card from a reciprocating library, a current library card from the home institution must be shown. If there is no picture of the borrower on the home borrowing card or institutional ID, a picture identification of the borrower will be requested for verification. The DALNET guest borrowing card and picture ID must be shown whenever borrowing materials.
5. Before extending DALNET guest privileges, the reciprocating library agrees to check the user's patron record to verify that the user extended library privileges is in good standing with no blocks or holds having been placed on his/her library privileges at the home library. Each time a DALNET guest borrower requests to charge out materials his or her account will again be checked for blocks or holds. No items will be charged to a DALNET guest borrower whose privileges are blocked at his or her home institution.
6. Overdue fines, service fees, replacement costs, and other charges will be determined by the policies of the reciprocating library. Users from the home institution who borrow under this agreement will be notified directly by the reciprocating library regarding overdue materials, recall materials, service fees, and replacement costs.
7. When a guest borrower incurs outstanding charges that exceed \$50, the reciprocating library agrees to initiate the designated procedures as noted below:
  - A. The reciprocating library will inform the home library.

- B. The reciprocating library will place a block on the individual's guest borrowing privileges.
  - C. In the event that the outstanding charges (over \$50) are paid in full by the user, the reciprocating library will inform the home library and the block on the individual's guest borrowing privileges will be removed.
  - D. The reciprocating library will notify the home library within sixty (60) days that a guest borrower from the home library has incurred book replacement costs or damage charges. It is within the prerogative of the reciprocating library to determine when its materials are uncollectible. Payment by the home institution will be made [...]. Overdue fines will not be charged to the home institution.
8. Upon being informed that a student or staff member has incurred replacement costs or damage charges at a reciprocating institution, the home library agrees to those measures noted below:
- A. The user will be notified by the home library that a block has been placed on his/her library borrowing privileges at the reciprocating library.
  - B. The home library will assume liability for lost or damaged materials borrowed from the reciprocating library. All replacement costs and processing fees become the responsibility of the home library after normal notification periods employed by the reciprocating library have elapsed.
  - C. In order to recover these replacement costs and processing fees, the home library may, as its policies and procedures determine, place borrowing privilege blocks, registration holds, and/or transcript holds against the users who have incurred the fees.
9. Materials borrowed under this agreement will be returned by the users to the reciprocating library. Libraries may send mistakenly returned library books to the owner library. Patron overdue fines incurred as a consequence of a delay will cumulate.
10. For accounting and evaluation purposes, participating libraries agree to maintain circulation records that are A) institution specific and B) user specific.
11. DALNET academic libraries participating in this agreement reserve the right to discontinue participation in this agreement at any time. To terminate this agreement, a library must provide a letter of intent to the DALNET Board. Termination will take place 30 days after receipt of the letter.

N.B.: This agreement will be implemented in Fall 1999 when all the DALNET Academic Libraries have made the transition to Horizon.

Bosler, Gerry

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From: Paul Beavers [aa6536@wayne.edu]  
Sent: Wednesday, February 17, 1999 2:18 PM  
To: Gerald Bosler; Anaclaire Evans; Jim Flaherty; Jean Gilbert; Thomas Lewandowski; George Libbey; David Murphy; Nancy Skowronski  
Subject: WSU ILL Charges to DALNET Libraries

The following memo dated February 12, 1999 has been sent by Patricia Senn  
Breivik, Dean of the WSU University Libraries, to all DALNET directors:

The Wayne State University Libraries interlibrary loan and document  
delivery fee for educational and not for profit institutions is \$10.00 for  
each filled request. Effective March 1, 1999 the University Libraries will  
provide a discounted rate for DALNET member libraries of \$8.00 for each  
filled request. You may submit your request via DOCLINE, OCLC or ALA  
interlibrary Loan form.

We look forward to providing continuous service to the DALNET member  
libraries during the year.

:<<<<Nam et ipsa scientia postas est>>>>

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