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| **Date** | March 17, 2017 C:\Users\scaron\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\LKCRJA87\st_patricks_day_clipart_2[1].gif |
| **Working Group** | Access Services & Resource Sharing |
| **Task Force** | Resource Sharing Governance Task Force  |
| **Report Summary** | **Resource Sharing Testing**The GTF met during the week of March 6th and held testing session among the group. Testing went well, but there were some “bugs” that the group would like addressed before testing proceeds with all the CSU’s.* Multi volume requests take some practice to get them to run smoothly
* Configurations are not yet set to the policies approved by COLD.
* GTF needs to gain a better understanding of how to resolve/avoid mistakes in processing.

**Customizing the resource sharing request form**The group decided to include only the volume and comments fields on the request form. For those CSU’s that have multiple pick-up locations, the pick-up location field may also need to be included on the request form. New instructions are being written and will be posted and sent out via the list servs once completed.**Resource Sharing Policies Modifications**Based on feedback from Ex Libris, some minor modification may be needed to the replacement fee policy and the fulfillment response/turnaround time policy. The group is working on proposing modification suggestions to COLD. |
| **Description** | COLD approved the following policy recommendations. Based on feedback from Ex Libris and fellow access members, the GTF is working on modification suggestions for the following policies (the recommendations are still a work-in-progress):* **Replacement Fee**:
	+ **Approved Policy:** A replacement fee of the cost of an item + $15 or an approved replacement copy will be accepted for all lost Peer-to-Peer Resource Sharing items. Replacement copies will be approved by the owning library.
	+ **Potential Issue:** Many CSU’s do not have a replacement fee listed in the item records for the books. Alma requires this field to be a numeric value. To populate notices and to be able to send bills (which are sent out automatically) the records need to have a numeric value. These fields would have to be populated before notices/bills are sent. Alma could use a generic “replacement cost” field to access this information, but the field would have to be set at a constant number/price.
	+ **Potential GTF recommendation**: Set the “replacement cost” in ALMA to $75.00 and include information that if the replacement of the item is less than $75.00, the actual amount of the book will be charged.
* **Fulfillment response/turnaround time:**
	+ **Approved Policy:** The lending library will ship items within one business day (M-F) where the Resource Sharing department is open. Resource Sharing requests will transfer to the next library in the rota after two business days without a response to ensure libraries aren't skipped over weekends.
	+ **Potential Issue:** Alma includes weekends in the response time. It does not adhere to a M-F, business day, model. Therefore a setting of 2 days for a response time may cause some requests that could be filled to be passed on to another library. This could cause more unfilled requests to occur.
	+ **Potential GTF recommendation:** Set the response time to 3 days instead of 2 days. This would account for the weekend days in which most offices are closed. Resource sharing is working under the policy that all requests are to be filled/cancelled within one business day. Lengthening the response time to 2 to 3 days is only meant as a means of eliminated requests being passed along unnecessarily over weekend closures.
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| **Action Items** | Schedule for testing – New testing sessions will be determined Formalized recommendations for replacement feel and fulfillment response time policies.ROTA considerations – an initial design for the ROTA has been presented. Still need current statistics to determine order. I-SPIE sent out a call for statistics; the deadline to submit statistics is 2/3. Check with I-SPIE for statistics and then re-evaluate current ROTA design.  |