



## Holds/ILL Change Proposal (PKS / Polaris)

# Consortia - Many Paths, Common Goals



# The Problem

- ▶ Holds/ILL in Polaris is one of the main pain points
- ▶ An issue for small and large libraries; School and Public

# Few Comments from Survey

. The **holds** sharing is a mess.

The holds/ILL thing is an ongoing problem.

The holds system needs to be updated or streamlined.

# Some Steps to Improve the Process

- ▶ Changing Staff Permissions (ODIN Office - In Progress)
  - ▶ Limit access to library patrons only
  - ▶ Other patrons will still show, but cannot be changed (no requests, checkout, etc.)
  - ▶ Should eliminate/reduce placing requests on wrong accounts
- ▶ Set secondary RTF to 1 cycle only (Library-by-Library Request to change)
  - ▶ YOUR patron requests will cycle through all available libraries once. If not filled, it will 'return' to the home library for further processing
  - ▶ Currently sits in Secondary RTF till filled or cycle time expires
  - ▶ If not filled, it will "return" to the home library's Request Manager for further processing as an 'Active' request.
  - ▶ A couple of libraries have done this already; Put in request to ODIN office to make this change
- ▶ Better Reporting (ODIN Office - In Progress)
  - ▶ Working on a 'hindered' holds report
  - ▶ Request Manager can be unwieldy alone

# A Proposal for a 1-year Trial

## Allow Schools (K-12 only) to 'opt-out' of Resource Sharing / ILL

### ► Rationale:

- Limited Staff/Resource to check Picklists regularly
- Some operate as 'in-house' only already: 0 lent, 0 borrowed in 2023
- Ones that are checking the picklist are largely denying
- Ones that are not checking, request are delayed till system moves request on

### ► Benefits:

- Non-participating Schools: No need to act on Picklist (less stress)
- Publics and Participating Libraries: Limits pool of "Satisfied by" to only items at libraries participating
- "System Availability" in the PAC will reflect change (Items will still be 'visible' in PAC, but patrons cannot request)

# The Logistics

- ▶ ODIN Office will contact the list that currently have holds off for the summer to discuss individually as they return.
- ▶ Library Holdings will be Bulk updated to “Holdable by Patrons from this branch only”
- ▶ Trial will run for the next School Year (FY25)
- ▶ Revisit outcomes at end of school year
- ▶ Possible proposal to revise the ODIN Governance (currently requires all libraries to ‘participate’ in ILL)

Thoughts, Questions, Concerns?

