

High Demand & Holds Procedures at Public Library Consortia in Wisconsin

IFLS

How does your consortia allow holds to be placed/filled on new/high demand materials?

>For nearly all new/high demand materials (except some in formats that don't travel well and never allow holds), anyone is free to place holds

Are holds filled in a first placed/first filled manner or are holds/filling of holds limited in some way based on the library that owns the item or the patron requesting the item?

>MORE uses Sierra's local priority for holds option, so items first fill holds for pickup at the owning library chronologically, then holds for pickup elsewhere chronologically

If there is a limitation on holds/filling of holds, how long is the limitation in place for new materials?

>No limitation

If there is a limitation on holds/filling of holds, is the limitation removed by an automatic or manual process?

Is the limitation removed at the system level or by individual libraries?

Is there a non-compliance statement in your policy or recommendation?

>MORE's Circulation Policy has a "Loaning within MORE" section that's meant to cover the idea that libraries freely share all materials. The MORE Bylaws have a mechanism for libraries not complying with policy

Purchasing ratios

Does your consortium have purchasing guidelines recommending (or requiring) that libraries purchase additional copies of a title based on local holds per copy owned?

>Yes, a recommendation

What is the ratio?

>5 or fewer local holds per local item

Are libraries responsible for identifying titles on their own, or is a report prepared at the system level?

>On their own, primarily with Sierra's High Demand Holds function

Is there a non-compliance statement in your policy or recommendation?

>No

Northern Waters Library System

- How does your consortia allow holds to be placed/filled on new/high demand materials? High demand holds are placed and filled as any other item. Local holds are filled first. If there are no local holds but there are from other libraries, available items are used to fill those.

- Are holds filled in a first placed/first filled manner or are holds/filling of holds limited in some way based on the library that owns the item or the patron requesting the item? Local holds are filled first.

- If there is a limitation on holds/filling of holds, how long is the limitation in place for new materials?
No limitations

- If there is a limitation on holds/filling of holds, is the limitation removed by an automatic or manual process? No limitations

- Is the limitation removed at the system level or by individual libraries? No limitations

- Is there a non-compliance statement in your policy or recommendation?

Purchasing ratios

- Does your consortium have purchasing guidelines recommending (or requiring) that libraries purchase additional copies of a title based on local holds per copy owned? Our compliance agreement says: The library will order in a timely manner any books in high demand by local patrons. The current NWLN purchasing recommendation states: With the exception of Book Club borrowing, hold ratios for all materials follows purchasing 1 copy for 5-14 local holds; 2 copies for 15-29 local holds; 3 copies for 30-49 local holds; 4 copies of 50-99 local holds; and 5 copies for 100 local holds or more.

- What is the ratio? See above

- Are libraries responsible for identifying titles on their own, or is a report prepared at the system level? I check high demand holds periodically and I know there are some directors that do. We typically do not have long queues for items as other systems do so we have not found this to be a problem.

- Is there a non-compliance statement in your policy or recommendation? We have a generic complaint form that could be completed if a network member feels another library is not in compliance. If that occurs the executive team has compliance procedures to follow.

South Central Library System

These answers are based on our current policies, procedures and settings and do not include the parameters for our current pilot project for "Local Holds/Use" items.*

** Local Holds/Use pilot project allows owning libraries to retain certain new materials in-library for up to 60 days and only allows patrons from that owning library to place holds. If there are no local holds, the items remain on-shelf in the owning library for 60 days and then staff convert the items to "regular" item types that can fill a hold anywhere in the system.*

Holds on new/high demand materials

1. How does your consortia allow holds to be placed/filled on new/high demand materials?

1. Patrons can only place "any copy" holds on all item types, except for magazines.
2. If a new/high demand item is linked to a "regular" Bib record, their hold goes into the queue to be filled by any copy in the system.
 1. We have unique functionality that we call Reduced Transportation holds. When an item is checked in at a location, the software checks for active holds at that check-in location. If the date the local hold was placed is within the RTH date parameter, the item is trapped for the hold at the check-in location. If the date the hold was placed is outside of the RTH date parameter, the item is trapped for the first active hold in the holds queue, no matter the pickup location.
3. Libraries can also purchase extra copies of a new/high demand item and link them to GENERIC records that are walk-in checkout only. These records do not allow holds.

2. Are holds filled in a first placed/first filled manner or are holds/filling of holds limited in some way based on the library that owns the item or the patron requesting the item?

1. No, see above RTH explanation.

3. If there is a limitation on holds/filling of holds, how long is the limitation in place for new materials?

1. If the new/high demand item is on a "regular" Bib record, there is no limitation of filling holds.
4. If there is a limitation on holds/filling of holds, is the limitation removed by an automatic or manual process?
 1. No limitation
5. Is the limitation removed at the system level or by individual libraries?
 1. No limitation.
6. Is there a non-compliance statement in your policy or recommendation?
 1. No

Purchasing ratios

1. Does your consortium have purchasing guidelines recommending (or requiring) that libraries purchase additional copies of a title based on local holds per copy owned?
 1. Yes.

Member Purchasing Responsibility Policy

Member libraries are required to purchase sufficient copies of material to meet local demand. The following hold/copy ratios shall be met or exceeded by each member library:

Books (14-day loan period) [per facility or branch]

1 copy for 5 to 14 holds

2 copies for 15 to 29 holds

3 copies for 30 to 49 holds

4 copies for 50 to 99 holds

5 copies for 100 or more holds

Videos [per library – all MPL branches are considered one]

1 copy for 15 to 29 holds

2 copies for 30 or more holds

Excluded from this obligation are VHS tapes, NC 17 (unrated) video in any format, network television series, and full screen DVD when a widescreen version is available

Audiobooks*, Music [per library]

1 copy for 8 to 19 holds

2 copies for 20 or more holds

2. What is the ratio? See above.

3. Are libraries responsible for identifying titles on their own, or is a report prepared at the system level?

1. We run and post a Weekly report titled "Purchase Alert". This is the description of the report: "A list of all that have a holds to copies ratio greater than the current guidelines at the time the report was run. The report can be used to help determine if the library should purchase or purchase another copy of materials. Each library has their own copy of the report with the total copies owned by the library and the holds for their patrons. " and the Current thresholds:

Books: 5

Music: 8

Sound (non-music): 8

Software: 15

Video: 15

Other materials: 5

4. Is there a non-compliance statement in your policy or recommendation?

1. No.

Winnefox Library System

- We allow holds on high demand items. We never promise how quickly those holds will be filled, but, everyone is allowed to place a hold. Libraries previously had “Local Hold” items that could only be placed on hold by patrons of their library.
- Holds are filled on the basis of “My patron gets my stuff first”. So, if a patron has PLAINFIELD as their library, all of the PLAINFIELD items will go to the PLAINFIELD patrons first, then float through the system to fill remaining holds.
- Everyone can have 50 holds; we don’t restrict as to if those 50 are new items or DVDs or whatnot.
- All limitations are done at the system level.
- We run reports for when to set items to SHORTLOAN – across the system, high-demand items circulate for two weeks. The criteria is 5:1 – if five patrons have a hold on a single copy, it gets set to SHORTLOAN. If 5 patrons have a hold on 2 copies, then the item is not set to SHORTLOAN.
- We run a report every Monday, which emails to all libraries about their items, identifying what should be made SHORTLOAN and what should be taken off SHORTLOAN.
- Libraries may have high demand titles in their “Lucky Day” collections which means that the items can’t be placed on hold by anyone. However, libraries who have a Lucky Day collection also need to have at least one other freely circulating copy of the item.
- We do have a 5:1 purchasing guideline. Some libraries do 4 to 1. Some ignore the recommendation entirely. Some take into account the # of holds across the entire system, not just their own patrons’ holds. It varies based on the library’s materials budget and the director’s perception of “serving their community’s needs”.
- The system provides reports to help libraries identify titles that they might want to purchase based on demand. Some libraries subscribe to these reports regularly, others run them as needed, others ignore them.
- We have [“Principles of Participation”](#) for our consortium members which does include a section on non-compliance at the bottom. The principles are much broader than just hold/purchasing policies, though.