

Action Item 6: On-Order Holds

Proposed Change to Policy:

Submitted by: Tom Sloan, Live Oak Public Libraries

Live Oak Public Libraries would like to propose a 6-month pilot program for on-order holds, to determine the feasibility of using on-order holds in the PINES consortium.

Currently it is only possible to place holds once items are in hand and cataloged by their owning libraries. When using Acquisitions, auto generated barcodes are created in the system as placeholders until the items arrive and are cataloged with item in-hand. Currently, these placeholder barcodes are OPAC invisible and non-holdable. If on-order holds are approved, these barcodes would allow the owning libraries' patrons to place holds on items as soon as the titles are ordered, rather than waiting until they arrive and are cataloged. This would also assist libraries in managing their holds ratio on new titles, as popular titles may accumulate many holds before an item is actually delivered to the library.

This pilot program would only cover LOPL items and LOPL patrons, and would use existing functionality in Evergreen. The eventual goal of the pilot would be to continue using on-order holds at LOPL as well as making them available for other libraries using Acquisitions.

Survey Results:

The following summary is based on survey results from 45 PINES Subcommittee members and Directors representing 33 library systems. One question was asked:

Should LOPL pilot on-order holds functionality?

Summary of All Responses:

	Responses	Percentage
Yes	40	89%
No	4	9%
Not Sure	1	2%

Responses by Acquisitions Subcommittee Members Only:

	Responses	Percentage
Yes	3	100%
No	0	0%
Not Sure	0	0%

Responses by Cataloging Subcommittee Members Only:

	Responses	Percentage
Yes	5	100%
No	0	0%
Not Sure	0	0%

Responses by Circulation Subcommittee Members Only:

	Responses	Percentage
Yes	5	100%
No	0	0%
Not Sure	0	0%

Responses from Other Subcommittee Members and Directors:

	Responses	Percentage
Yes	27	84%
No	4	13%
Not Sure	1	3%

Comments**Comments For:**

- Does use of this function require the use of the acquisitions module? Just thinking ahead incase the pilot goes well and PINES opens it up to all.
- great idea!
- I have always advocated for allowing a patron to go ahead and get in line for a new book as long as there is a bib in the system.

- I would like to make sure this is a PINES wide option after the pilot.
- I would like to suggest changing the policy to allow holds to be placed on DVDs. This has been addressed over the years and it seems that we should be able to reach an agreement to share these items as we do other materials. The item cost is really not a good enough reason not to do so as audiobooks and books can be much higher in cost.
- Our system does not use acquisitions at this time but if we do in the future this is a feature we would be interested in using.

Comments Against:

- Having worked in systems with different ILS, where this was routine, it was a nightmare. Too often titles are delayed or cancelled or not in stock. Equally, items come and may not exactly match the acquisition record thus being attached to a different bibliographic record. In both situations, the holds are left hanging. Unless staff is super diligent about checking unfilled holds, this creates more issues than it solves.
- There are several reasons why I believe this proposal will not be beneficial to PINES. 1st, I believe that this proposal will actually increase the holds ratio on popular titles, as there is a longer time period for patrons to request a title. 2nd, I believe (unless it was made abundantly clear on the item record page or in-person that this title was not yet at the library) it would create confusion and frustration for patrons as to why their hold had not yet become available. 3rd, because LOPL patrons would have a longer period than other PINES patrons to request holds for any LOPL new items than the initial 6 month waiting period, it would create a privileged class of patrons within PINES, and diminish the equal sharing of resources.