Proposal to Extend the CSU+ Loan Period

1. Background

Over the course of the last ULMS Committee cycle, the Resource Sharing Functional Committee has been investigating how well the current CSU+ loan period meets user needs. Anecdotal evidence demonstrates that the current loan period does not meet user needs and that either a longer loan period and/or the ability to renew CSU+ materials would provide a better experience for users.

The RSFC has been gathering and analyzing data for this project and can continue to do so. Unfortunately, due to a current limitation in Alma Analytics, a complete CSU systemwide data set will not be available until after a planned October update. However, we were able to gather preliminary data from the home libraries of RSFC members and the preliminary results indicate that CSU+ users would likely keep CSU+ books for longer if they could. The preliminary data also indicates that longer loan periods did not result in a significant increase to the rate of lost books. In investigating resource sharing consortia across the country, we found that at least 50 SHARES libraries have a 16 week loan period while the SUNY consortia also uses a 16 week loan period. Orbis Cascade is also currently investigating extending their loan period.

Although our data collection is ongoing, the current COVID-19 situation warrants an immediate solution that supports teachers and learners during the crisis. By allowing users to hold on to their materials for longer via longer loan periods or renewals, CSU+ could support shelter in place and social distancing health measures by limiting unnecessary trips to the library, reducing concerns about access to materials, and possibly reducing the volume of items handled by staff as users won’t need duplicate requests to meet their needs. Since the inception of CSU+, patrons who need materials for longer than the 60-day loan period have been directed to request a second copy and wait for it to arrive even if the copy they have in their possession is not needed by another user. While this practice has provided a less than ideal experience for our users, it has also now become impractical as a result of COVID-19. In order to better serve our users and to limit exposure to COVID-19, the RSFC believes now is the time to consider an adjustment to the CSU+ loan period and/ or renewal policy.

The following are possibilities the RSFC has identified as solutions.

1. Possibilities
   1. Extended loan period - no renewals
      1. Instead of offering renewals, we could simply extend the CSU+ loan period. The loan period could be extended to 16 weeks (a full semester) as seen at other consortia and corresponding to the loan period for many local loans to cover the entire semester.
         1. Benefits: User’s would not have to worry about renewing their materials and if they forget to renew, they would not be fined.
         2. Drawbacks: Since users would not be notified to return until near the due date they might keep the material for longer than they need, limiting the ability for other users to request/access.
   2. Patron Initiated Renewals
      1. The user would initiate renewals via their Primo account. The renewal would be automatically granted and the due date updated. In Alma, we can set a maximum number of days in addition to the loan period that a user could borrow an item. The user would then be able to renew as many times as they want up to the maximum renew period.
         1. Benefits: Only users who request the renewal would get an extension. Additionally, we could track patron initiated renewals in Alma Analytics.
         2. Drawbacks: This requires the user to act and is thus a less seamless experience.
   3. Auto renewal
      1. The ability to configure this would depend on each campus and their current renewal configurations.
         1. Benefits: Users receive a renewal automatically.
         2. Drawbacks: Systemwide auto renewals would not be possible without all campuses adopting the same local renewal configuration. This would require more work at the campus level to create a systemwide practice.
2. Recommendation

The RSFC recommends changing the CSU+ loan period to 16 weeks. This would allow the user to have the material for the entire semester and reduce the need for users to come to campus.

If after COVID-19, a 16 week loan period is felt to be too long, the data can be analyzed and renewals can be considered. We do not recommend returning to a 60 day loan period.

Thank you for considering this proposal.

Resource sharing Functional Committee 2019-2020:

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