Preparing for
Local Priority for Holds

MORE, Spring 2018

What is Local Priority for Holds?

- Holds with a pickup library that matches the owning library are filled first
- Right now, holds are filled strictly in the order they are placed
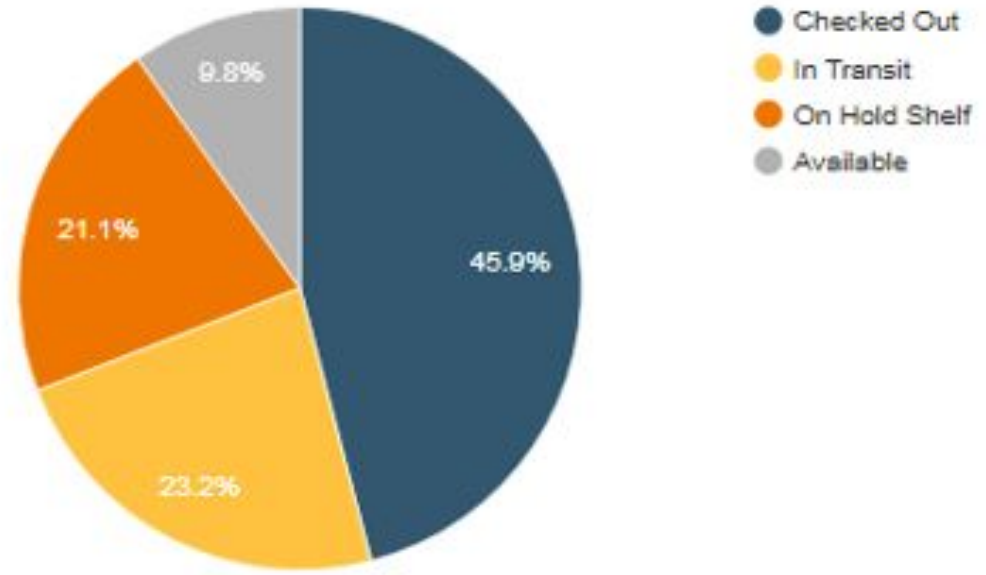- Home library does not come into play

Timeline

- November 2017 Directors Council decision. Rationale:
  - Get local copies into the hands of local patrons efficiently
  - Reduce time spent in transit
- The change will probably happen in May, about a month after the switch to lending library rules

The life of a high-demand item: Spider-Man. Homecoming
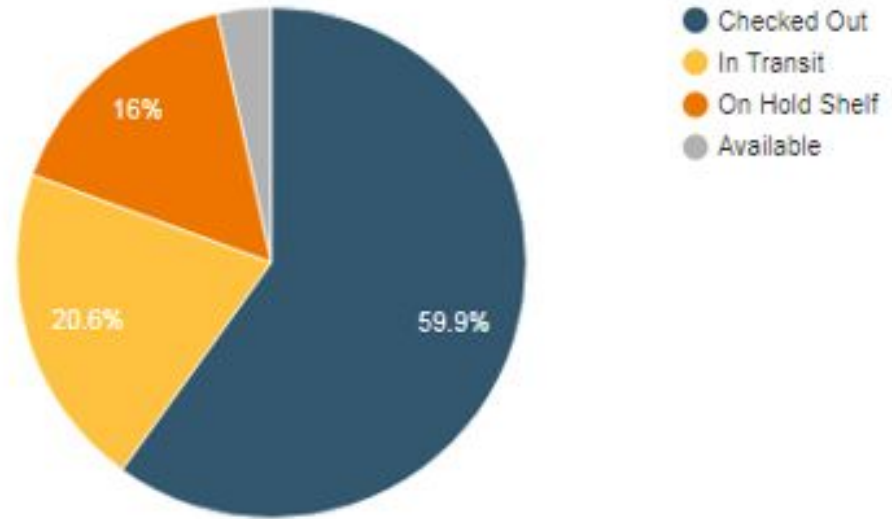
Most checked-out DVD in December 2017

71 copies

- Checked Out
- In Transit
- On Hold Shelf
- Available

45.9% Checked Out
23.2% In Transit
21.1% On Hold Shelf
9.8% Available

The life of a high-demand item:
Deep freeze / John Sandford

Most checked-out book
in December 2017

77 copies

How will it work?

Mechanics

- Holds queue still in date-placed order
- If holds are detected on checkin, the system looks through the queue for a pickup location that matches the owning location
  - If there's a match, it fills the oldest matching hold
  - If there's no match, it fills the oldest hold
- Items purchased with MORE High-Demand Purchase Project funds will fill holds in date-placed order

Example

b23928608: Music CD
By the way, I forgive you / Brandi Carlile.
Attached items: ec, me, nr

Date-placed order	Date placed	Pickup location	Owning location	Date placed order	Date	Pickup location
1	22-Jan	ec	ec	1	22-Jan	ec
2	26-Jan	os	me	2	26-Jan	os
3	4-Feb	ec	nr	15	24-Feb	nr
4	7-Feb	if	ec	3	4-Feb	ec
5	8-Feb	cf	me	4	7-Feb	if
6	10-Feb	ch	nr	20	8-Mar	nr
7	11-Feb	cf	ec	8	12-Feb	ec
8	12-Feb	ec	me	5	8-Feb	cf
9	12-Feb	ba	nr	6	10-Feb	ch
10	17-Feb	ca	ec	11	17-Feb	ec
11	17-Feb	ec	me	7	11-Feb	cf
12	20-Feb	ec	nr	9	12-Feb	ba
13	20-Feb	rf	ec	12	20-Feb	ec
14	23-Feb	au	me	10	17-Feb	ca
15	24-Feb	nr	nr	13	20-Feb	rf
16	26-Feb	rl	ec	22	13-Mar	ec
17	26-Feb	cf	me	14	23-Feb	au
18	7-Mar	cf	nr	16	26-Feb	rl
19	8-Mar	rf	ec	23	17-Mar	ec
20	8-Mar	nr	me	17	26-Feb	cf
21	12-Mar	pe	nr	18	7-Mar	cf
22	13-Mar	ec	ec	19	8-Mar	rf
23	17-Mar	ec	me	21	12-Mar	pe
24	19-Mar	ph	nr	24	19-Mar	ph

Helping Patrons
with the
Holds Change

What will patrons see?

Online catalog records will still show total holds
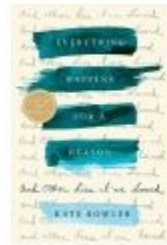
Everything happens for a reason : and other lies I've loved / Kate Bowler

Bowler, Kate,

📖 BOOK | 2018

Not Available at Amery New Materials (DUE 03-22-18) see all

31 holds on first copy returned of 9 copies ⟵

🔖 Request it

Additional actions:
🛒 ✉ ➕

	5 holds				
CANCEL	TITLE	STATUS	PICKUP LOCATION	CANCEL IF NOT FILLED BY	FREEZE
☐	Lady Bird / A24 and IAC Films present ; producers, Scott Rudin, Eli Bush, Evvelyn O'Neill ; written and directed by Greta Gerwig.	54 85 olds	Pickup Location [IFLS ▼]	01-10-19	Freeze ☐
☐	Three billboards outside Ebbing, Missouri / Fox Searchlight Pictures and Film 4 present ; a Blueprint Pictures production ; a Martin McDonagh film ; written and directed by Martin McDonagh ; produced by Graham Broadbent, Pete Czernin, Martin McDonagh.	08 of 38 lds	Pickup Location [IFLS ▼]	01-19-19	Freeze ☐

My Account will not show the patron's place in the queue

Why can't I see my place in line?

- MORE-member libraries are trying a new system to reduce the time it takes to fill holds
- Locally-owned items are filling local holds first [rather than all libraries' popular items traveling to fill holds at other locations]
- Your place in line will vary depending on the mix of owning libraries and other holds, so it won't show up in your account online

You may want to use fliers or a sign

When will my hold come in?

For titles your library owns:

1. Determine how many copies your library owns
2. Sort the holds queue by pickup location
3. Tell your patron where they are in line for your copy

Example: "You're 4th in line for one of our two copies"

Note: another library's copy could fill one of those holds, reducing the wait time

When will my hold come in?

For titles your library doesn't own:

You may want to be vague

Example for a patron in a 16-hold queue and no available items:
"There are 15 other holds, and 4 copies going around"

MORE High-Demand Purchase Project copies may be in the mix

Consider for purchase

Also check:

- Hold pickup notification settings
  - Sierra
  - Library Elf
- Freeze or add a "not before" date the hold if the concern is about it being filled too soon
  - Use online account to freeze, remember to unfreeze
  - Set an absolute date in Sierra

How to investigate holds

See owning locations from Summary tab

- View: All to include order records
- View: Hold to see item status (Due Date)

#	Record Number	DESC
17	o26169046	Other: RUSKC
18	o40108302	Other: Menomonie
19	o40111222	Other: Menomonie
20	o40108314	Other: Menomonie
21	o39176666	Other: NewRich
22	o39176678	Other: NewRich
23	o19108746	Other: Prescott
24	o24454461	Other: Roberts
25	i51959203	I TYPE:9 ITEM LOC:aldvd OPACMSG:- BARCODE:3839000
26	i51948837	I TYPE:172 ITEM LOC:amadv OPACMSG:- BARCODE:3026
27	i51957449	I TYPE:172 ITEM LOC:audvf OPACMSG:- BARCODE:30286

Summary — Record o3324831x — Bib-Level Holds 388 — View: a All

Summary — Record i51959203 — Item-Level Holds 0 — Bib-Level Holds 388 — View: h Hold

Hold Copy Returned Soonest | Hold Selected Item | Transfer Holds | All

#	Recnum	Call Num	Barcode	Location	Due Date	Holds
1	i51959203	DVD THREE	38390005387940	aldvd	03-23-2018	0
2	i51948837	DVD THR	30268100720181	amadv	IN TRANSIT	1
3	i51957449	DVD THRE	30286000399278	audvf	IN TRANSIT	1
4	i51970065	DVD THR	30684001367692	badvd	IN TRANSIT	1
5	i51970089	LUCKY DAY DVD THR	30684001367759	baldd	03-19-2018	0
6	i52003139	DVD THR D	30304000639443	bldvd	03-26-2018	0

How to investigate holds

See holds from
Bib-Level Holds tab

- Default sort is
  chronological
- You can sort by
  pickup location

Holds Snapshot,
February 15, 2018

All titles: 639,912

Titles with holds: 17,716

Titles

- Without holds - With holds
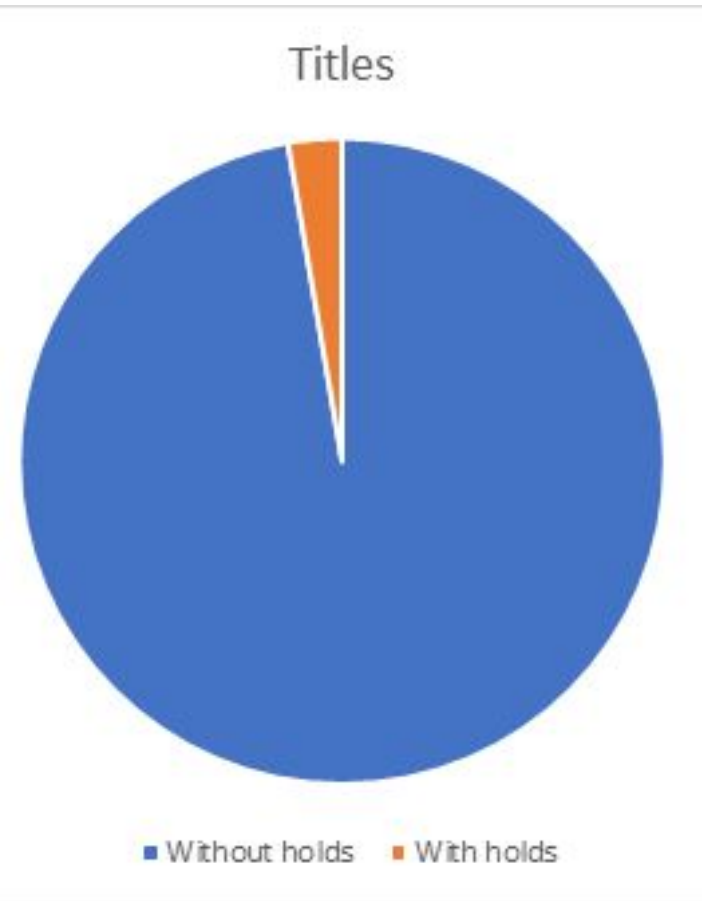
Titles with holds

o   Titles with 300+ holds: 9

o   Titles with 200-299 holds: 12

o   Titles with 100-199 holds: 35

o   Titles with 80-99 holds: 19

o   Titles with 60-79 holds: 41

o   Titles with 40-59 holds: 65

o   Titles with 20-39 holds: 192

o   Titles with 10-19 holds: 393

o   Titles with 2-9 holds: 3,459

o   Titles with 1 hold: 13,472

Titles with holds

■ 100+   ■ 40-99   ■ 20-39   ■ 10-19   ■ 2-9   ■ 1
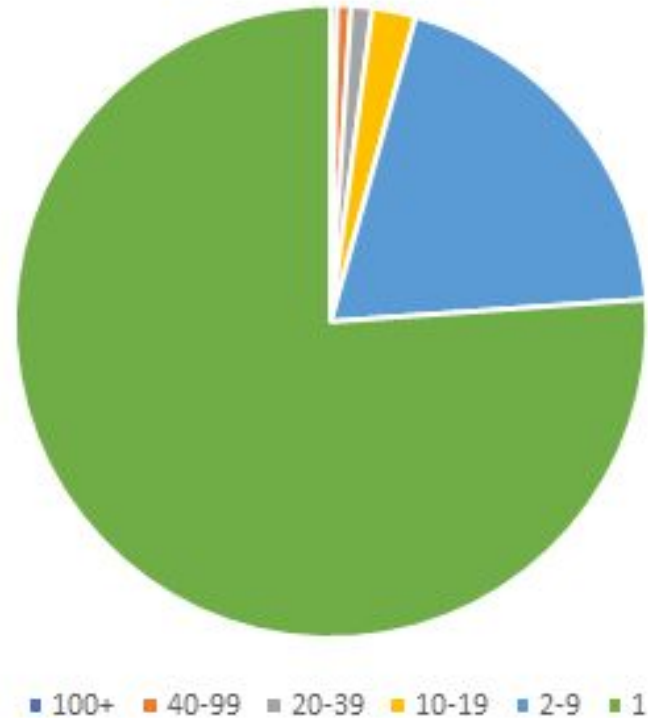
Checkouts of locally-owned items vs. borrowed items

System-wide, 73.26% of February 2018 checkouts were locally-owned items

Find your library's % on the IFLS Dashboard

- Baldwin: 71%
- Chippewa: 80%
- Cumberland: 82%
- Eau Claire: 84%
- Fall Creek: 49%
- Hammond: 65%
- Menomonie: 74%
- Ogema: 67%
- Plum City: 62%
- Roberts: 77%
- Somerset: 65%

All holds: 53,605

o Patrons waiting in queues of 300+ holds: 3,298

o Patrons waiting in queues of 200-299 holds: 3,128

o Patrons waiting in queues of 100-199 holds: 4,662

o Patrons waiting in queues of 60-99 holds: 4,433

o Patrons waiting in queues of 2-59 holds: 24,628

o Patrons with the only hold on a title: 13,472

Patrons waiting in holds queues
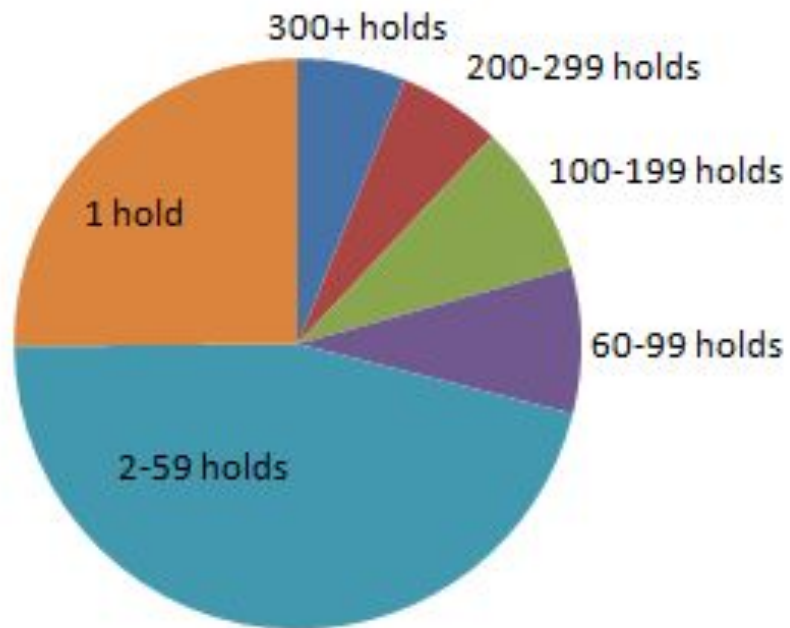
Holds on new titles

- 2,131 titles added in the last 2 weeks
- 219 (10.3%) have at least one hold

- 5,475 items added in the last 2 weeks
- 1,964 (36%) are associated with holds

Collection Development Tools

Decision Center

Popular Titles

- Evaluation > Circulation > Top Titles > Popular Titles
- Top 100 system-wide high-demand titles
- Note: don't set "Holds Placed" as Transaction in conjunction with any item record-based limits or you won't see most holds

Decision Center

Supply and Demand Buying or Hold-to-Item Ratio Buying

- Development > Selection > Buying reports
- For system-wide high-demand titles, not limited to 100
- Note: don't limit to your library location, or you won't see holds for your patrons on titles you don't own
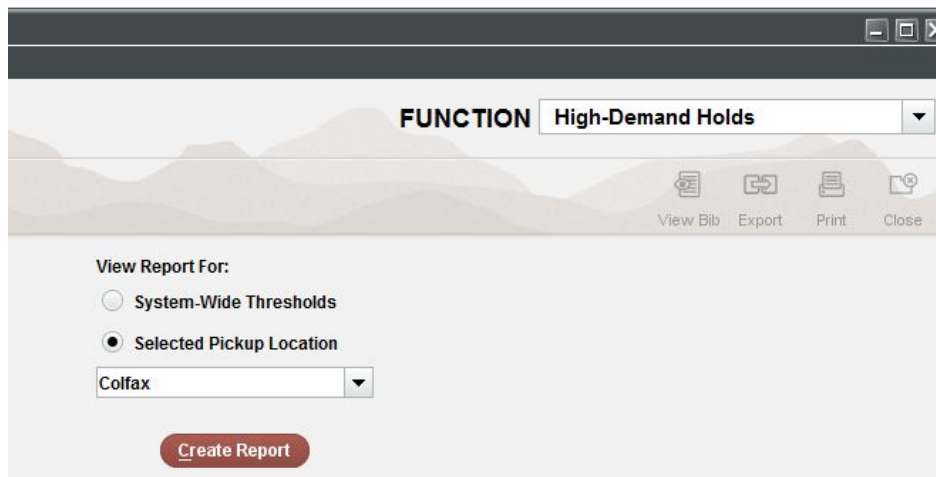
Gone rogue

Decision Center's Missing Items
- Maintenance > Clean-Up > Missing Items
- To find long overdue, long in transit, or stuck on holdshelf titles

From Sierra
- Run overdue notices religiously
- Monitor bills for high-demand titles

Sierra's High-Demand Holds function

- Shows titles on hold with your library as pickup location, whether or not your library owns the title
- Titles appear on a hold-to-item ratio basis
- <u>Only way to get title information based on hold pickup location</u>

Sierra's High-Demand Holds function

- The report shows system-wide holds and items, and local holds and items
- System numbers include local numbers
- Right-click on any entry and "View bib" to see the full record in Sierra

#	Title	Author	Material Type	System Holds	System Items	Local Holds	Local Items
1	The 2% rule to get debt free fast : an innovative method to pay your loans off ...	Michael, Alex (...	BOOK	2	3	1	0
2	10-20-30 minutes to sew for your home / Nancy Zieman.	Zieman, Nancy ...	BOOK	1	1	1	0
3	The 17th suspect / James Patterson.	Patterson, Jam...	BOOK	38	0	3	0
4	97 things to do before you finish high school / Steven Jenkins and Erika Stal...	Jenkins, Steven.	BOOK	1	2	1	0
5	100 recipes you'll make forever : perfected in our test kitchen for success i...		BOOK	29	4	1	0
6	About that kiss / Jill Shalvis.	Shalvis, Jill, aut...	BOOK	10	7	1	0
7	Absolutely A-line : 1 easy pattern = 26 adorable dresses for girls / Wendi Gra...	Gratz, Wendi.	BOOK	1	0	1	0
8	An acceptable time / Madeleine L'Engle.	L'Engle, Madel...	BOOK	1	5	1	0
9	Accidental heroes : a novel / Danielle Steel.	Steel, Danielle, ...	BOOK	44	0	1	0
10	The address : a novel / Fi[...] **Copy** / **View bib** / **Export** / **Print**	Davis, Fiona, 19...	BOOK	2	14	1	0
11	After Anna / by Lisa Scott...	Scottoline, Lisa...	BOOK	43	0	2	0

Report for Ellsworth

Sierra's High-Demand Holds function

You can change the hold-to-item ratio threshold at which titles appear on your library's report.

You can get fancy with these limits!

Questions