

Agenda item August 9, 2018 – Old Business, Member Library Questions

Review member comments—Draft of Purging Lost Item Records (Procedure)

Purging Lost Item Records

To maintain the cleanliness and consistency of the SHARE database, member libraries are responsible for purging lost item records on an annual basis. Items that have not been cleared after several years are often the last item on a bibliographic record, and can cause frustration when searching. When the lost item fee is paid, the item should then be deleted. The patron will then own the item, if it is eventually found. Items that have been in lost status for between one (1) to two (2) years should be deleted by the member library. Any unpaid fines associated with the deleted item will remain on the patron record. Any items in lost status after three (3) years will be deleted by SHARE staff. SHARE will send a report of items scheduled for deletion, for the member library to review and resolve. If the lost items are still in lost status 90 days after notification, SHARE staff will purge the item records.

Submitted by Donna.Schaal on Tue, 07/03/2018 - 4:13pm

I often do not purge an item right away after the lost item fee is paid for the following reasons:

- (1) I have staff that need to evaluate whether or not the item is worth replacing and sometimes you just don't get to that right away; we try to do this once a quarter unless it is a high traffic item;
- (2) If the item is a high traffic item, I like to retain the statistics by substituting a new barcode onto the item record so you do not lose those statistics. Of course, we only do this if the replacement completely matches the item; that takes time to get the item purchased and processed; and
- (3) Sometimes the payment of the item takes a little bit of time to get to your library.

For example, someone lost my first season of Game of Thrones, it is one of our highest circulating DVDs ever in this building. We replaced it (purchasing the exact same copy). I wanted to maintain those statistics. But it took a while to recognize that it was lost, repurchase it; process it; etc. Then we used that same item record to keep the statistics.

Another example that just happened -- someone else's patron lost my item -- it was a DVD -- first it was lost for a while -- then the patron came in to their library saying that the cost was too high -- that library called me to see if I would waive some of the fee, which I did -- and then I had to wait while this person sent me a personal check -- meanwhile her library went ahead and cleared her account of the payment -- when I got the check a week later -- I had to make sure that it cleared the bank since it was from the other side of the state -- and then I was ready to see if I wanted to replace that item. I just recently replaced the item and it got put on back order from Amazon. So, we still don't have it.

With that in mind, I would suggest instead of: "*When the lost item fee is paid, the item should then be deleted.*" Replace with: "When the lost item fee is paid, the owning library should evaluate that item for replacement or deletion." That leaves it up to the member library to address the issue.

"The patron will then own the item, if it is eventually found." This is a local decision and an internal procedure on whether or not the library decides to accept the item back and whether or not they will reimburse the patron. I would suggest removing this sentence completely.

"Items that have been in lost status for between one (1) to two (2) years should be deleted by the member library." I would suggest removing this sentence completely since it is redundant.

I do agree that after three years (or whatever time period) that SHARE could run the library a list and then offer to do a bulk deletion for the library. I don't agree that it should be an automatic scenario. However, if the majority thinks that it should be done automatically then I would like it clarified, such as:

SHARE will send a report of items scheduled for deletion, each January, for the member library to review and resolve...and then continue with the 90 day scenario. (I threw in January but you need to pick some month that isn't as busy -- not at the start of the school year or the end; or during summer reading for publics).

This is just my two cents worth -- and I know that it is hard to balance between what is good for the consortium and what will work in the individual libraries.

Submitted by Bobbi.Perryman on Thu, 07/05/2018 - 10:02am

I agree with Donna that libraries should have the choice to replace or delete. The bib can be suppressed so it does not show up in the PAC.

We were deleting lost items after two years, but then we ran into the problem, more than once, of a patron returning the deleted item in the bookdrop and then we had no idea which patron account was linked to the item. Lately, I have just been setting our long-lost items to not display in the PAC so no patrons can place holds on them.

I do not support the idea, at all, of SHARE doing any sort of automatic deletion of item records. I can see that causing problems and things being deleted that shouldn't be. Perhaps the lost item auto-deletion can be set up like the patron record purge. A library that is comfortable with the auto-deletion can opt in, but libraries that would rather evaluate the records themselves don't have to.

Thank you

Submitted by Tracy.Pierceall on Wed, 07/11/2018 - 10:48am

I concur with Bobbi. I am currently in the process of doing inventory of the books in my library. (I started here 10 months ago.) From what I can tell, this has never been done, so it's going to take some time--certainly more than a year. Currently I'm marking items as missing because if that book is found, I can just check it in and we still have all the old information attached to it. For example, if a book was donated to our library, I make a record of that donation in the database so that if the information is needed for an exhibition, it's available. If a lost book is deleted and I have to recatalog it later, that old information is lost. I think that you would remove a ton of confusion for people looking for items if you could leave the missing/lost items in the database but hide them in the PAC. I think deletion of the items we have in the database should be up to the individual libraries.

Submitted by Rick.Balsamello on Wed, 07/11/2018 - 11:29am

I have 2 issues with auto purging lost items. 1) I keep on top of my list of lost items, most being tied to patron blocks. I know the fees are still attached to the patron record, but sometimes the title disappears with the barcode when deleted. I insist on associating those fields because I have numerous patrons, especially on charges that have been outstanding for awhile, who have selective amnesia and swear they never checked out those items. Having all the documentation ends the argument, even if they stubbornly refuse to pay the bill. 2) If the items are still able to be replaced if the original copy isn't returned, it is much easier to keep the same item record when a replacement is found.

I understand space considerations in the database, but I think as much as can be managed and monitored at the branch level is much more desirable.

Submitted by Ryan.Johnson on Wed, 07/11/2018 - 3:53pm

As Bobbi suggested, I think it is a great idea to allow libraries to opt-in to an auto-deletion program. I also like Tracy's idea of hiding Lost items in the PAC (I personally think Missing items could remain visible). Either way, that too could be an opt-in program.

Submitted by Katie.Heaton on Wed, 07/18/2018 - 1:22pm

This is addressing the long - lost items that have gone beyond the normal, reasonable period of resolving. There are 81,599+ item records with lost status as of today in our SHARE database. 33,459 Lost 2 years or more. This trend is not sustainable in our catalog. We currently have other policies to covering some of what is in the draft policy. This just needs to be specific to LONG LOST and perhaps a new report can be added in Polaris so libraries can start working on long lost items at their convenience. I would recommend something like the following:

Purging Long Lost Item Records

To maintain the cleanliness and consistency of the SHARE database, member libraries are responsible for purging of lost item records as determined by their local library. Lost items that have not been purged after 3 years will be considered long lost item records. SHARE staff will send a report of items that are recommended for purging for member libraries to review and resolve. Any unpaid fines associated with the purged item will remain on the patron record. If the long lost items are still in lost status 90 days after notification, SHARE staff will purge the item records.

Submitted by Kyla.Waltermire on Mon, 07/23/2018 - 11:39am

SHARE's draft policy is a step in the right direction in terms of maintaining our database's integrity, but I like Katie Heaton's suggested revision better. This leaves it up to each member library to determine how to handle Lost items for up to 3 years, which is PLENTY of time to decide how to handle each item.

What concerns me is that this issue is coming up at all. Our member libraries have a responsibility to maintain their records for the good of the group and it appears that many might not be doing so. Could be for perfectly valid reasons--lack of staff/time or not being aware that this isn't being addressed--but it's still mucking up the database and reflects badly on us to our patrons. Let's do some housekeeping!