



NICE Project: Holds Fulfillment

Holds Fulfillment Targeted Workgroup Recommendations

The Holds Fulfillment Targeted Workgroup recommends that the shared ILS employ priority on local holds* and that high-demand collections** be allowed. Holds will be filled utilizing priority of local holds for all items not set to high demand. Priority of local holds is when local holds of the owning library and its branches are filled first.

Once items are released from high demand, holds will be filled based on priority of local holds and the paging priority lists established by each system. When needed, one temporary item record will be added to the bib to allow all to place holds. **Guidelines for High-Demand Collections will need to be determined early in the implementation phase.** Library directors will be **surveyed by system ILS staff** to better understand the top priorities, such as filling holds lists quickly or having browsable collections. This information will be used to determine necessary ILS settings and High-Demand Collection needs for each library.

The workgroup further recommends that the ILS be set up so that an item is paged for within each consortia, according to their paging priorities, and then paged at the other consortia's libraries. Printed transit slips will indicate the library system along with library information so libraries and delivery sorters can easily know where to send materials.

In addition, the group recommends the NICE Cataloging Workgroup review and advise on the process for adding one temporary item record to a bib when a first High-Demand collection item is added to allow for the placement of holds.

Decision Highlights

It is important to note that this workgroup worked diligently to reach a satisfactory compromise around this set of recommendations. The two systems currently employ significantly different approaches. This recommendation was crafted in the spirit of compromise and an understanding that processes, especially related to high-demand collections, are not static and will likely need to be revisited. Therefore, the workgroup recommends the following follow-ups:

- An evaluation of how holds are working one year after the merger begins and allow adjustments to be made during implementation as needed. The evaluation process should include:



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- A temperature check at six months. A town hall-style meeting is recommended to gather information from the membership.
 - Pre-merger data collection for benchmarking at the one year evaluation.
 - The consideration of conducting a patron satisfaction survey as part of the data collection process.
 - Monitoring the pattern of borrowing, especially related to high-demand collections, and utilizing the collaborative decision-making workgroup's recommendation to make changes within the ILS as needed to ensure stability and equity.

Definitions

*Priority of local holds is when local holds are filled first. A local hold is one for which the pickup location is one of the owning library's locations or branch locations.

**High-demand collections are collections of new popular materials. While in the high-demand collection, the titles will fulfill the holds of that library's patrons only. Once those holds have been fulfilled, the item will go on the shelf at the owning location. Any patron may visit the owning library to check out high-demand materials that are available on the shelf. Once the item is moved from the high-demand collection, it can fill holds from other libraries.

The workgroup recommends that high-demand collections:

- Include select new materials only
- Have materials be included for a limited times

Background

Northern Waters Library Service (NWLS) and Wisconsin Valley Library Service (WVLS) are collaborating to engage in a comprehensive joint ILS consortium exploration project. Last year, system and member library staff formed the NICE team to determine the value and feasibility of an ILS merger between the two systems and respective ILS consortia. Based on that information, the team determined that an ILS merger was feasible. LSTA funds are being used to facilitate this second phase of work in which targeted workgroups are being formed around critical decision points. The workgroups are made up of system and member library staff who have insights, expertise, or perspectives that will help craft recommendations.

Each workgroup uses the NICE Project's [Decision Making Principles and rubric](#). During the feasibility process of the project, the team created a core set of values to apply to future ILS decisions to ensure those shared decisions conform, as much as reasonably possible, to core values. These core values reflect what the NICE project team heard from stakeholders throughout the initial stage of work. Those values were translated into the rubric that is used to guide decision-making.

The Holds Fulfillment Workgroup met three times to discuss current holds processes of each consortium. The group identified additional information to gather, including running lists on current holds in both systems to compare holds and identify duplicates, as well as a comparison of how holds would be filled within the two systems under different scenarios. The group looked at a hold if it were filled using the current NWLS set up of employing priority of local holds for all, the current WVLS set up of utilizing high-demand collections and filling holds in the order they were placed, and finally a combination of the two.

Next Steps

This recommendation and all others from the project will be included in a final report, which the NICE team, the respective ILS consortia, and ultimately, the system boards will carefully consider in their decision-making.

Can I Offer Feedback?

Yes! Feedback is welcomed, encouraged, and necessary. Submit your questions or comments using this [form](#), which goes to the NICE Leadership Team. Please indicate that your feedback is related to the ILS selection workgroup recommendation.