

SIMON FRASER UNIVERSITY

Memorandum

To: Senate
From: Senate Library Committee
Date: June 21, 1994
Subject: Changes to Library Loan Policy

Decisions taken by the Senate Library Committee at its June 1, 1994, meeting gave rise to the following motion:

Motion: "that Senate approve the following changes to the Library Loan Policy as set out in S.94-50:

1. That faculty, staff and graduate students be given a semester loan period with one renewal for all general loans books, regardless of whether the books are high or low usage category.
2. That undergraduate students and extra-mural borrowers be given:
 - a. a three-week loan period with one renewal for high use category books
 - b. a semester loan period with one renewal for low use category books.
3. That high use category books for undergraduates and extra-mural students be increased to 20% of the STACKS collection or 200,000 volumes.
4. That all new books being added to the Library's collections be given a high use category for undergraduates and extra-mural borrowers until a low usage pattern results in adjusting these books to a semester loan category for undergraduates.
5. That the semester loan due date be adjusted to one week after the exam period with no grace period for return.
6. That the Library monitor these changes in the loan policy and make a further evaluation with any recommendations to the Senate Library Committee in June 1995"

**Senate Library Committee
Simon Fraser University**

MEMORANDUM

To:	Senate	From:	Senate Library Committee
Re:	Change to Library Loan Policy	Date:	June 12, 1994

Decisions taken by the Senate Library Committee at its June 1, 1994, meeting gave rise to the following motion:

That Senate approve six changes to the Library Loan Policy as listed on the following pp. 2-4:

INTRODUCTION

The Senate Library Committee undertook a review of the Library's loan period and other policies which affect library book availability in 1992, following the recommendation by the University Library Review Committee in its Report of October 1991. Senate approved a new Loan Policy recommended by the Senate Library Committee in January 1993. It was implemented beginning fall semester 1993.

The new loan policy which was aimed at increasing book availability contained the following elements: (1) higher demand material, selected on the basis of its previous five semester loan frequency history and which was not initially to exceed 10% of the Library's collection, was identified for a three-week loan period; (2) the rest of the collection was to remain on a semester loan basis, except that: (3) Library material for which there are two or more holds/recalls would be placed on a temporary one-week loan period until all user requests have been satisfied. In addition, the Library implemented a user-placed on-line holds/recalls system as a new service to make it easier for faculty and students to obtain needed material which was on-loan to others. And the Library also implemented a touch-tone telephone book renewal system to make it possible for faculty and students to continue to renew their books from home and the office, because the previous by telephone block renewals system based on a single loan period was discontinued.

Implementation of this policy caused various forms of borrower dissatisfaction and failed to meet the objective of increasing book loans.

RECOMMENDED CHANGES TO THE LIBRARY LOAN POLICY:

1. **That faculty, staff and graduate students be given a semester loan period with one renewal for all general loans books, regardless of whether the books are high or low usage category.**

Rationale:

It is recommended that the Library allow faculty, staff and graduate students to have a semester loan period. This is the predominant practice of Canadian and U.S. university libraries. Thirteen out of nineteen Canadian Association of Research Libraries surveyed by SFU Library had different loan periods for faculty, staff and undergraduates. And in most of these cases, graduate students have parity with faculty. Many SFU faculty and graduate students believe that they use library materials differently than undergraduates, i.e., that their research requires that they keep library materials for longer periods of time. It must be acknowledged that undergraduates typically complete their work within the semester, whereas faculty and graduate research is not limited to a single semester.

2. **That undergraduate students and extra-mural borrowers be given:**
 - a. **a three-week loan period with one renewal for high use category books.**
 - b. **a semester loan period with one renewal for low use category books.**

Rationale:

These first two recommendations represent a widely practiced compromise between optimizing book availability and meeting the special needs of faculty, staff, and graduate students in their use of library materials. These recommendations will allow the Library to meet the differing needs of the different library patron groups.

RECOMMENDED CHANGES TO THE LIBRARY LOAN POLICY:
(continued)

3. **That high use category books for undergraduates and extra-mural students be increased to 20 % of the STACKS collection or 200,000 volumes.**

Rationale:

The Buckland Availability Model used by the Library states that the number of book loans should increase when high demand books are placed on short term loan. This did not happen during the last two semesters when the new loan policy went into effect. In fact, the new policy seemed to discourage book loans by faculty and Reserves Room book loans by undergraduates. With respect to the Reserves Book Room books, this was probably due to the implementation of higher and automatic fines.

4. **That all new books being added to the Library's collections be given a high use category for undergraduates and extra-mural borrowers until a low usage pattern results in adjusting these books to a semester loan category for undergraduates.**

Rationale:

This recommendation will insure that the availability of newly acquired high usage books is guaranteed immediately.. Waiting several semesters until the high usage pattern is made clear for new books would not optimize book availability.

RECOMMENDED CHANGES TO THE LIBRARY LOAN POLICY:
(continued)

5. **That the semester loan due date be adjusted to one week after the exam period with no grace period for return.**

Rationale:

Setting the due date one week after final exams allows students to use material throughout the exam period without penalty, and it also encourages the return of material so that it is back on the Library's shelves in time for the beginning of the new semester.

6. **That the Library monitor these changes in the loan policy and make a further evaluation with any recommendations to the Senate Library Committee in June 1995.**

Rationale:

The recommended loan cycle for high demand books still does not exactly coincide with the model options identified by the Buckland model. It will be necessary to monitor activity for the next year to see if availability has actually improved.

W.A.C. BENNETT LIBRARY

TOTAL BOOKS LOANED:

	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94
MAY	26,882	22,856	29,327	32,043	29,794	28,684
JUNE	31,435	27,887	30,309	27,216	32,010	32,128
JULY	33,108	31,178	31,198	35,228	38,768	33,640
AUG	16,985	25,198	32,216	37,121	35,574	40,435
SEM TOTAL	108,410	107,119	123,050	131,608	136,146	134,887
SEP	44,215	45,898	45,840	50,747	43,653	46,468
OCT	58,871	63,999	62,926	67,339	65,037	62,040
NOV	62,238	64,227	62,371	65,924	69,943	71,411
DEC	36,797	30,344	34,873	40,029	50,508	32,216
SEM TOTAL	202,121	204,206	206,010	224,039	229,141	213,145
JAN	48,212	39,483	44,792	57,847	49,735	49,209
FEB	52,559	56,801	60,262	62,667	56,316	58,546
MAR	66,332	66,692	67,144	69,293	69,957	72,567
APR	16,917	45,663	55,561	52,931	57,556	30,923
SEM TOTAL	184,020	208,639	227,759	242,738	233,564	211,245
YR'S TOTAL	494,551	519,964	555,819	598,385	598,851	559,277
+ /- % Change		+ 5.1%	+ 6.9 %	+ 7.7 %	0 %	- 6.6 %

Note: Periods above are for the Academic Year

W.A.C. BENNETT LIBRARY

BOOKS & JOURNALS SHELVED:

	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94
MAY	51,543	54,036	60,662	66,086	64,309	70,234
JUNE	65,476	61,662	68,350	80,086	74,442	82,650
JULY	80,706	70,792	85,488	81,495	89,495	98,558
AUG	84,719	73,780	78,218	80,225	72,699	80,978
SEM TOTAL	282,444	260,270	292,718	308,103	300,945	332,420
SEP	53,426	59,299	73,370	72,512	64,106	71,168
OCT	90,249	90,140	119,331	132,688	112,902	105,540
NOV	133,852	138,849	138,722	136,842	148,418	163,725
DEC	101,822	87,749	83,986	83,236	114,615	90,317
SEM TOTAL	379,349	376,037	415,409	425,278	440,041	430,750
JAN	65,020	66,105	66,903	69,952	73,669	80,744
FEB	91,353	91,321	94,616	95,955	75,974	95,690
MAR	141,425	164,329	147,342	146,541	146,014	155,427
APR	118,679	121,009	124,410	93,545	117,906	80,624
SEM TOTAL	416,477	442,764	433,271	405,993	413,565	412,485
YR'S TOTAL	1,078,270	1,079,071	1,141,398	1,139,374	1,154,549	1,175,655
Circ Total	494,551	519,964	555,819	598,385	598,851	559,277
InLib Total	583,719	559,579	585,579	540,989	555,698	616,378 + 10.9 %

Note: Periods above are for the academic year.

W.A.C. BENNETT LIBRARY

Books CHARGED OUT By Patron Category

Category	1992/93 Percentage	1992/93 # of Books		1993/94 Percentage	1993/94 # of Books
UNGRAD	73.0 %	252,407		69.3 %	164,489
GRAD	12.4 %	42,952		14.0 %	33,263
FACULTY	3.3 %	11,546		2.9 %	6,821
ALUMNI	3.4 %	11,833		3.3 %	7,882
EX-MURAL	1.7 %	6,015		2.3 %	5,535
STAFF	1.1 %	3,825		1.0 %	2,366
TOTAL		345,653			237,169

Books RENEWED by Patron Category

Category	1992/93 Percentage	1992/93 # of Books		1993/94 Percentage	1993/94 # of Books
UNGRAD	24.4 %	20,225		24.4 %	13,461
GRAD	43.5 %	36,091		44.6 %	24,615
FACULTY	13.0 %	10,770		8.6 %	4,749
ALUMNI	7.5 %	6,240		8.1 %	4,459
EX-MURAL	3.1 %	2,570		4.0 %	2,181
STAFF	3.1 %	2,648		2.6 %	1,448
TOTAL		82,970			55,185