

INITIAL DRAFT - subject to change as project proceeds.

## MSC Reorganization Ideas

All plans include:	Reasoning
<b>Circ/Administration</b>	
Once rules are decided, MSC staff will have the authority to set dates and migrate old rules on a set schedule.	A clear timeline will help libraries set goals and inform staff and patrons about changes, if necessary; setting a schedule prevents the process from dragging on while waiting to hear back from individual libraries.
Have Sirsi remove currently unused item types, home locations, categories, and users after clean-up/migration	There are hundreds of policy codes in the current system that are not in use. Once the policies have been cleaned up and rules have been identified, removing old policies is the easiest way to reduce confusion and improve function.
No grandfathered in/exceptions to rules. Some rules that are in use but not currently "approved" could become "approved" rules. Once decided, libraries will need to migrate to accepted rules on a set schedule.	Having clearly defined rules is extremely helpful for both staff and libraries. If a rule is not included in the current plan, it will need to be added as an "approved" rule that anyone can use or the library will need to choose a different rule.
No more special circulation rules for the end of the school year or closings. Libraries should use the special due date function or batch changes to records	A significant amount of staff time is used at the beginning and end of each school year to set special end-of-year due dates for school and academic libraries. These rules require special circulation rules that are modified each time (but cannot be removed), and MSC staff keep changes on spreadsheets that are constantly updated and maintained during these periods. It is a highly complicated endeavor because libraries all have different closing dates. If all schools and academics in the MSC chose to use this system, MSC staff would literally not be able to manage this system -- IT IS UNSUSTAINABLE. The special due date function allows libraries to set all checkouts to a certain day for the remainder of that session. As far as work expended, each library using the special due date function is much less time-consuming than MSC staff tracking and changing these special due dates.
Unlimited renewals and unlimited fine accrual removed from all circulation rules.	Multiple issues have been reported from libraries that use unlimited rules, including: patrons who have lost books simply renewing them for years instead of paying for items; fines building to hundreds of dollars on items that are not worth anywhere close to that amount; problems with collections and waiving large fine amounts. Having higher limits is possible, if needed, but unlimited fines and renewals create problems that are difficult to fix after the fact.
Sharing groups will have mandatory shared circ rules in all options, and will decide on shared Item Types. Sharing groups will need a guiding document that will help MSC staff when they change or add new libraries to a group.	Sharing groups will work much more effectively if they share Item Types and circulation rules. This will: make errors easier to identify and fix; make statistics more accurate; improve the patron experience at sharing libraries; and make any future changes easier.
MSC Staff would have the authority to set deadlines, make changes, and decide on limits.	Opening all reorganization changes and dates to a larger discussion will drastically extend the time needed to complete the reorganization. MSC staff will seek out input from member libraries as much as possible, but need the ability to make decisions about this process without clearance at each step.

<b>Reports</b>	
Set amount of time for libraries to add dates to report templates; after period, erase all templates created before 2012	Many of the reports templates created before 2012 are either broken or not in use. MSC staff cannot see a "last run" date on templates, and so it is up to libraries to keep track of their own templates. Setting a deadline for libraries to add a date to their template title will make this process move quickly. Cleaning up the templates will make it easier for libraries and the MSC staff to find templates that are still in use.
Adoption of assume-lost/long overdue and lost/missing policies for all member libraries	Many libraries have items that are long overdue, lost, missing, or otherwise unavailable. In some cases, these items appear checked out rather than lost, causing problems for patrons, staff, and MSC staff. Additionally, those lost items sometimes stay in the system for years. This makes maintenance more difficult, decreases the accuracy of the database, and may cost the holding library money (since lost items and users attached to them never get deleted). Setting up assumed lost and long overdue processes would help keep the catalog clean and would help MSC staff fix problems.
Consolidation & reduction of reports where possible (remove CIRC login for reports, 1 early overdue email, etc.)	The new Onshelf Holds wizard is more accurate than the old CIRC report. Libraries that have not changed already should change to using the wizard so that the OSH on CIRC no longer has to run. Some reports, like an early overdue warning, could be combined to run for all patrons instead of having 160+ reports individually run for the same purpose.
<b>Users</b>	
Reduce/remove user profiles that libraries are not using.	Many libraries have user profiles that they no longer use. If there are no users in a profile, libraries can confirm that they no longer use the profile. Then these profiles will need to be deleted by SirsiDynix.
Reduce/remove system user profiles not in use or used rarely	There are many system user profiles that are rarely or never used. For example, CPRFKIDS (which was created for special use but is no longer used). A thorough review of these "system" users will identify if they are still needed.
All "regular" (non-system) users need to be using 14-digit numbers even if they do not use barcodes	Fixing errors is easier; sorting by User ID in MSC reports is helpful when libraries use 14-digits; standardized users encourage library development; migration match errors are decreased; there is already a standard in place; eBook, database & other authentication works better.