

IDS Conference
SUNY Geneseo
August 8 and 9, 2006

Report of ILL Staff break out sessions

Should we consider a **standard project-wide lending period** for regular loans?

- Suggested: 4 weeks for patron use and one week for transit for a total of 5 weeks (35 days).
- Mark Sullivan noted that statistics show that 40% of IDS transactions are renewals.
- Longer loan periods can reduce the renewals workload
- National ILL code states that system due date is date due back at lending library
- Many found that sending regular overdue notices and blocking patrons was effective for getting materials back
- Some follow up but there was a note of concern over time it takes to routinely follow up with delinquent patrons
- Questions:
 - Is the high rate of renewals unique to ILL loans in IDS project or is it the same for materials loaned in our own libraries?
 - Are patrons picking up late and needed a renewal just to use the material?
 - Are we too good? Some patrons ask far in advance anticipating that it will take longer to obtain the material and renew to have available at the point they actually need it.

LAND:

- Do we need a tracking system?
 - Cost is an issue – can't price the service beyond what we can afford
 - Are the problems of lost and/or misdirected materials significant?
 - We know that there have been problems, but what portion of overall numbers?
 - Simple solution offered – note TN or ILL number on the manifest
 - Some are already doing this in one form or another but it adds to the workload
 - Jon Penn will check to see if field can be added to manifest
 - Tracking by number will be done on a voluntary basis
- CD&L is being purchased by Velocity and the contract is up for renewal
 - We should look at tracking options and costs again after new contract is in place

Direct Request:

- It is important for improving turn around time because the time saved in processing for the borrowing library goes to the lending library when measuring overall delivery time goals.
- Why does OCLC use the ISBN (can be duplicate) over the OCLC number (unique)? Jon Penn will follow up.
 - Noted that if the database for Direct Request isn't WorldCat the OCLC number won't work
- There are loopholes – several students at an institution asking for many copies instead of buying textbook but there are benefits – catches duplicate requests
- Why has the transition to DR been so slow?
 - Perhaps concern over loss of control?
 - Need for limits? Can use the ILLiad limits to also control number of Direct Requests a patron can submit
 - How can you "cut off" student requests at end of semester if using DR? – suggested to change profile temporarily

Trusted Sender:

- Can also speed up turn around time
 - Requires use of Odyssey and not every one is using Odyssey yet

Staffing Survey:

- Issues—ILL is complex and it is hard to pull in other staff to help without significant investment in training
 - There are more demands on time for server support, software installation and upgrades and documentation
 - Student Assistants contribute significantly to staffing levels but present unique problems with turnover and training
 - Administration needs to recognize that when ILL is busy, “throwing bodies” into the office isn’t necessarily the solution
- Students
 - Oswego screens candidates for student employment and will share the questions they ask potential student assistants
 - Some institutions use more experienced students as supervisors and trainers for new students
 - Oneonta will share their training check list
 - Some institutions offer higher pay or increments
 - One defines ILL student positions at the same level as their Technical Department defines their student technical support workers in recognition of the complexity of the ILL job.

Turnaround time:

- Red is depressing!
- With LAND pick up once a day, it can be advantageous to batch IDS material preparation to time with pick up but that shows longer transition between receipt of request and shipping status – not necessarily a negative workflow indicator but rather a workflow choice
- Delivery time is the critical piece
 - You can look at individual statistics to see that the yellows and reds are occurring during the transit time tracking.

IDS Website:

- Suggested to add a statistical chart to show time of day that requests are initiated – Mark is already working on it
 - Can use this data to inform staff scheduling and coordinate workflow with time of LAND pick up
- Add a “contact button” so it is easier to link to people who can help with specific questions/issues

Standard pull slips and labels/wrappers:

- Oswego shared templates for both a lending library wrapper and “sticky” label with information present that would allow the wrapper to be used by the borrowing library making it unnecessary to print another label when processing the item for a patron
 - Due date is ILLiad due date – would lose the 1 week transit time
 - Possible confusion over library addresses
 - Some lenders don’t put labels/straps on – just send paperwork
 - Would require batching IDS materials at receipt because material from other libraries might require printing a label/strap
 - Suggested that libraries print barcodes on label/strap—it makes for faster processing and not everyone is doing this
 - Agreed that Oswego staff would put proposal on web site and other libraries would consider the suggestion in the context of their current workflow

Staffing Survey (again – after Tuesday’s discussion, all agreed to look at data more closely and discuss again on Wednesday)

- IDS is a PILOT PROJECT so it is reasonable to ask the question – *Is the increased workload sustainable?*
 - Some libraries have had some success with cross training staff to help at busy times – some have used Reference Librarians and some circulation staff
 - There are still significant issues with cross-training because it takes time to get new staff up to speed – consider the complexity of ILLiad and workflow
 - Hard to ask for more staff time in ILL if the overall staffing levels in the library are low
- Recommended that ILL librarians and directors agree to meet regularly to both review and interpret the statistics and discuss workflow demands. For example, upgrading to ILLiad 7.2 is imminent and will take considerable staff time.

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12 August 2006.