The ILL Mouse that Roared: How a four-person ILL/DD department transformed itself into a powerhouse of campus and community service

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Why Transform ILL services?

• Libraries are dramatically changing.

• Patrons expect enhanced services their way.

• We need to make our electronic and remaining print collections more accessible.

• The Rethinking Resource Sharing Initiative encourages such innovation.
About ECU & Joyner Library

• East Carolina University is the third largest state university in NC.
  – Student Body: nearly 28,000 FTE
    • Leader in distance education (approximately 6,000 students)
  – Degree Offerings: 152 programs; 72 master’s & 18 doctoral
    • Large education, business, medical, & nursing programs
  – Mission: includes a mandate to serve eastern NC region

• Joyner Library is the largest library in the eastern part of NC.
  – Collections: 1.4 million titles; 60,000+ serials; 400+ databases
  – Employment: 110 FTE faculty and staff (excludes student assistants)
  – Budget: $12.1 million (after 17.9% permanent cut in 2009/10; 2.0% one-time cut in 2010/11; and 7% permanent cut so far in 2011/12)
About Joyner ILL: Staff & Statistics

Lynda Werdal
Borrowing Manager
36 years library work
(K-12, corporate, academic)

Jackie Cannon
Lending Manager
32 years library work
(medical, academic)

Suzanne Metcalf
Document Delivery Manager
16 years library work
(academic)

2010-2011 Statistics

• Borrowing
  – Requests: 7,115
  – Patrons: 1,246

• Lending
  – Requests: 16,955
  – Libraries: 1,361

• Document Delivery
  – Requests: 5,639
  – Patrons: 1,030
Major Joyner ILL Transformations

- Borrowing as a Reference Service
- Borrowing beyond OCLC Libraries
- Borrowing for Undergraduates
- Borrowing for Retirees & Friends
- Lending Media
- Lending Special Collections
- Lending Electronic Resources
- DocDel for Off-campus patrons
- DocDel for On-campus patrons
- DocDel for K-12 schools
Borrowing as a Reference Service

• Emphasize assisting patrons, not just processing requests
  – Walk patrons through using ILLiad
  – Train patrons on using the catalog, WorldCat, the e-resource locator, the OpenURL linker, and databases that arise while talking with them
  – Suggest titles we discover as we search for a patron
  – Refer patrons to specific resources/collections, don’t just cancel requests that are owned by ECU
  – Suggest Reference librarian consultations to patrons who are unsure about their requests
Borrowing beyond OCLC Libraries

• Patrons have higher expectations because of easier online discovery, eBay, etc.

• International Libraries
  – Translation sites & browsers
  – IFLA vouchers & KVK virtual catalog

• Vendors & Document Suppliers
  – Credit card & YBP Gobi Account
  – IFM from Better World Books & Alibris

• Contacting authors directly
  – Google & social networking sites
  – Contact info in authors’ other articles

• Contacting possible non-libraries directly
Borrowing for Undergraduates

• Rationale:
  – No consortial borrowing network nearby
  – Nearest large library is about two hours away
  – Campus emphasizing higher quality research

• No limits on material types or numbers

• Statistics (2010/11):
  – 15% of Borrowing is for Undergrads
  – Articles: 333 Loans: 838
  – Patrons: 319 Academic Areas: 45
Borrowing for Retirees & Friends

• Library administration asked for ways to
  – enhance library/campus connections &
  – encourage community members to join the Friends of the Library.

• Offered ILL Borrowing; gained approval
  – Had been providing to faculty *emeriti*

• Created unique status & departments (useful for stats, main menus, & alerts)

• Expanded service started fall 2010
  – 30 patrons (including earlier *emeriti*)
  – 193 requests
Lending Media

• Saw Borrowing’s need for media; sought to lend
  – 2005: Could only lend stacks VHS tapes
    • DVD lending was not authorized.
    • Music loaned media to UNC & KUDZU.
  – 2006: Explained need to Music Library
    • Trial, then permission to lend from Music
  – 2009: Rewrote the ILL policy to include
    lending all circulating media from both the
    Music Library & Joyner’s collections

• Statistics
  – 2001-2005: cancelled nearly all Music Library media loans (about 200)
  – 2006-2011: fulfilled nearly 2,000 Music Library media loans
  – No more losses and damages than to books; rarely need to recall
Lending Special Collections

- Requests for Sp. Coll. materials were always cancelled/redirected to contact Sp. Coll. directly.
- 2008: I asked why & gained approval to copy from select journals in Special Collections.
- Created a new Special Collection/ILL workflow for selectively permitted materials.
  - ILL receives requests.
  - ILL takes pull slip to Special Collections.
  - Sp. Coll. staff pull & ‘check-out’ item to ILL.
  - ILL immediately scans in ILL office & then directly returns to Special Collections.
- ACRL/RBMS approved new guidelines in 2011.
Lending Electronic Resources

- Most academic serials are now electronic; many print back volumes are being weeded
- Mid-2000s
  - Less than a dozen were known to be ILL OK
  - Lending cancelled requests
  - Implemented OCLC’s deflection
- 2009-10
  - Joyner purchased, implemented an ERM
  - ILL read over 100 licenses, interpreted & entered them, created a list to reference
- 2010-11
  - Began using IDS’ Serial Solution Addon
  - Investigating OCLC’s WC Knowledge Base
DocDel for Off Campus Patrons

- **Distance Education**: Provides ECU materials to students, faculty, & staff who live/work away from ECU
  - Loans shipped by UPS with prepaid return labels
  - Articles, chapters, etc. scanned for email delivery
  - DE Patrons: 187 (avg. 2006-11); 242 (highest 2008/09)
  - DE Requests: 970 (avg. 2006-11); 1,400 (highest 2008/09)

- **Special Circumstances**: Provides ECU materials to patrons with disabilities and those traveling for a term
  - Patron status & delivery updated to DE in ILLiad.
  - Counted as DE; not tracked separately
DocDel for On Campus Patrons

- **Pull&Hold:** On-campus patrons, including area residents, can have materials pulled and held at the circulation desk
  - 2006/07: started for books only; media added later
  - 2010/11: expanded hold period & delivery locations
  - 913% increase - 513 to 4,687 requests (2006/07:2010/11)

- **On-Campus:** Graduate students, faculty, & staff receive free scans delivered from our print & microfilm collections
  - 2008: started for faculty; only for print materials
  - 2009: expanded to grad. students & staff; microforms
  - 258% increase - 210 to 543 requests (2008/09:2009/10)

- **Routing:** We route Borrowing requests to these services.
DocDel for K-12 Schools in Region

- Special outreach effort by Teaching Resources Center, Circulation, & ILL
- School librarians can request articles & loans to be sent (like DE without UPS)
- Why provide this service?
  - ECU College of Education pre-service teacher program sends students out.
  - Joyner Library has large collections.
  - Eastern NC is rural and poor.
  - School libraries are underfunded.
  - Other libraries are far apart.
DocDel for K-12 Schools in Region

- **Eastern North Carolina Region**
  - 31 counties
  - 36 school systems
  - 564 eligible schools
- **Usage Figures** (2003-2009)
  - 18 schools (of 564 eligible)
  - 1,055 requests (68% from stacks)
- **Survey: Why not used more?**
  - Outside of normal workflow
  - Teachers & students procrastinate
  - Other libraries are closer or easier
  - Costs to ship materials back to ECU
Making Transformations Possible

- **Streamlining & Automation**
  - Work areas & job tasks
  - Custom Holdings & Constant data
  - ILLiad emails, routing, & queues
  - OCLC Deflection
  - ILLiad’s Lending web portal
  - RapidILL & ILLiad Addons

- **New Service Philosophy**
  - Think from patron’s view & listen.
  - Willingness to try, refine, & expand

- **Support of Administration**
  - Limited cuts to ILL funding
  - Allowed innovation

- **Support from All Departments**
  - IT & Web Services
  - Collection Development, Acquisitions, & Cataloging
  - Reference, Special Collections, & Teaching Resources Center
  - Music Library
About Transforming ILL

Benefits
• Higher patron satisfaction
• Improved research product
• More collection use
• Library reciprocation
• Supports campus goals, esp. for student success
• Keeps the job interesting

Challenges
• Identifying need & solution
• Gaining buy-in & permission
• Time & money investment
• Changing ILLiad settings & templates, policy directory, website, brochures, etc.
• Assessment & Improvement
• Transforming never ends.
Ongoing & Future Transformations

- Enhance ILLiad interface
  - Added LDAP authentication
  - Consolidated request forms
  - Adding help text & shorter tutorials at point-of-need
  - Add IDS’s GIST APIs
- Use LHRs for item deflection
- Migrate Pull&Hold to ILS
- Increase ILL/Special Collections collaboration
- Perform service assessments
- Expand on-campus DocDel scanning to undergraduates
- Reform & expand the K-12 school DocDel service
- Provide fee-based services to companies and organizations
- Recruit NC cultural institutions to request from & lend to us
- Add limited services for alumni association members
Questions?

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