Ship it to Me!: Evaluating Interlibrary Loan Services for Distance Students

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Lavery Library
St. John Fisher College
St. John Fisher College & Lavery Library

- Rochester, NY

- Student population:
  - 2,700 full-time undergraduates, 200 part-time
  - 1,000 graduate students

- Academic Programs
  - 33 academic majors with 11 pre-professional programs
  - 9 graduate programs
  - 3 doctoral programs

- Net borrowers
- ~50% of requests are for graduate/doctoral students
Background: Distance Students* & ILL

- Ed.D. in Executive Leadership extension sites added
  - College of New Rochelle (CNR) near NYC in 2009
  - Onondaga Community College (OCC) near Syracuse in 2013

- SJFC began providing ILL services to CNR/OCC sites in Fall 2013
  - Loans not available at sites’ libraries and articles
    - A different return shipping workflow for each location

- After 1 school year, we assessed procedures & policies
  - Made updates to eliminate patron/staff confusion and support best practices

*For this presentation, distance students are defined as students at campuses not in proximity to SJFC; this excludes online students.
ILLiad Distance Student Setup

• Need to distinguish between campus and distance students
  ○ Distance students have own statuses: OCC, CNR
  ○ Routing rule moves incoming loan requests to Doc Del:

<table>
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<tr>
<th>RuleNo</th>
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<tbody>
<tr>
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<tr>
<td>ProcessType</td>
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</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>u.Status = 'OCC' and t.RequestType = 'Loan'</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Doc Del</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Distance Student Request in Process</td>
</tr>
<tr>
<td>RuleDescription</td>
<td>This rule moves requests received from OCC Students into the Doc Del Processing queue</td>
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</tbody>
</table>
ILLiad Distance Student Processing

- Distance students select status (OCC, CNR) and provide shipping info upon first request:

- Request appears in Doc Del custom queue:
Distance Student Request Processing

Open Request in Doc Del
"Distance Student Request in Process."

Confirm in Sierra:
1. Expiration Date is end of current semester.
2. Patron Code 3 is Ed. Educ Leadership
3. Address is correct in ILLiad

Is student eligible for distance services?

Yes

In Worldcat Tab:
Check local library for holdings:
CNR (10805), OCC (13215).

No

Correct patron’s status in their ILLiad account and Save.

Route request to Borrowing – Awaiting Request Processing.

Yes

Does the local library have this title available?

Choose “Local Library Owns Item” Email, Insert Call # and send.

No

Check Z39.50 tab – Does Lavery have this title available?

Route request to Borrowing – Ok to Go.

Yes

Click Copy Info

Click Finished Searching.

No

Input Due Date 6 weeks from current date.
ILLiad Distance Student Processing: Borrowed Loans

- Requests for loans not owned by site or Fisher were sent out, then routed back to Doc Del upon checkin:

<table>
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<td>ProcessType</td>
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<tr>
<td>TransactionStatus</td>
<td>Awaiting Post Receipt Processing</td>
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<td>MatchString</td>
<td>u.Status = 'OCC' and t.RequestType = 'Loan'</td>
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<tr>
<td>NewProcessType</td>
<td>Doc Del</td>
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<tr>
<td>NewTransactionStatus</td>
<td>Awaiting DD Stacks Searching</td>
</tr>
<tr>
<td>RuleDescription</td>
<td>This rule moves requests for books borrowed and received for OCC Students into the Doc Del processing queue</td>
</tr>
</tbody>
</table>

- Borrowed loans were processed through to *Distance Student Request Shipped* (custom queue)

- Patrons were notified their items shipped
ILLiad Distance Student Processing: Pre 2014 Fisher Owned Loans

• Items manually routed into Awaiting DD Stacks Searching
  ○ Due date of 6 weeks from current date added
  ○ Marked Found
  ○ Automatically routed to *Distance Student Request Shipped* (custom queue)

• Patrons were notified their items shipped

• Locally owned loans were checked out to patrons’ Sierra accounts for tracking & catalog status purposes
OCC Shipping Procedure: Pre 2014

● “OCC Student | TN # _____” barcode cover was cut and placed over loan barcode to avoid confusion upon return at Checkout Desk.

● Loan was packaged and dropped off at Bookstore with mailing info attached for UPS shipping.

● When finished, patron returned item to OCC SJFC bookdrop for program staff to physically return to SJFC Campus.
CNR Shipping Procedure

● “CNR Student | TN # ____” barcode cover was cut and placed over loan barcode to avoid confusion upon return at Checkout Desk.

● Loan with unsealed envelope and return instructions were placed in box with shipping info affixed:

● Bookstore printed prepaid UPS return label, sealed box, mailed

● Items returned at a UPS drop-off and brought over by Bookstore
Return Shipping Instructions

Keep Return Envelope! – You will use this to return all materials to Fisher’s Lavery Library

When you are ready to return borrowed materials to Fisher:

- Place all borrowed items into envelope
- Make sure envelope is sealed. Be sure envelope is securely closed to avoid loss or damages during shipping.
- Drop off to UPS pickup store/location.
  - If you travel to Fisher campus, you may also return materials to the Checkout Desk in Lavery Library.

Please contact us with questions! ill@sjfc.edu or 585-385-8106
Visit our online ILL guide for more information: http://libguides.sjfc.edu/ill/onlinedistance
Summer 2014: Assessment

- Waited one academic year before assessing
- New staff joined in Spring 2014
  - Opportunity to revamp policies/procedures before training began
2014 Procedure Assessment: What Worked

- What worked:
  - ILLiad workflows
    - Custom routing between Borrowing/Doc Del
    - Custom statuses (OCC, CNR)
    - Use of Doc Del for distance student processing only
  - Shipping to patrons through UPS
  - Return shipping via UPS for CNR students
Procedure Assessment: What Didn’t Work

● Checking Fisher owned items out to patrons’ accounts in Sierra
  ○ Duplicate overdue notices with different due dates
  ○ Patron-initiated renewals created due date inconsistencies between ILLiad and Sierra

● Return procedure for OCC patrons
  ○ No formal return schedule
  ○ Difficulty for patrons to drive to OCC bookdrop
Procedure Assessment: What Didn’t Work

- Barcode covers not apparent/stable enough
  - Fisher owned loans checked in into Sierra only, not ILLiad

- Inability to track UPS return shipments for CNR students
  - Reliant upon Bookstore

Student workers: Do not check in. Give to supervisor upon return!
Procedures That Didn’t Work: Solutions

- **Challenge:** Checking Fisher owned items out to patrons in Sierra
  - **Solution:** Check Fisher owned items out to ILL Account in Sierra

- **Challenge:** Return procedure for OCC patrons
  - **Solution:** Streamline return procedures and provide UPS return shipping labels for both OCC/CNR
  - Required an adjustment period for OCC

NEW RETURN SHIPPING POLICY

Items will now be returned by UPS! Please see the enclosed return shipping instructions for details.

If you have Interlibrary Loan books that were checked out before 6/25/2014, and do not have UPS return shipping labels, please return them to OCC.

Questions? Contact us at 585-385-8106 or ill@sjfc.edu
Procedures That Didn’t Work: Solutions

- **Challenge:** Barcode covers not stable/apparent enough
  - **Solution:** Add neon green bookstraps under barcode covers

- **Challenge:** Inability to track UPS return shipments for CNR students
  - **Solution:** Discussed options with bookstore, set aside for later review
2014 Policy Assessment: What Worked

- What worked:
  - Renewals: patrons emailed ill@sjfc.edu to renew (option in overdue notices)
    - Opportunity for communication
  - Requesting Fisher-owned items through ILL rather than coming to campus

- What didn’t work:
  - Lack of distance student overdue policy = extremely late returns
    - First year with new service led us to wait on policy development
    - Distance shipping makes campus overdue policy unrealistic
    - General overdue notice was sent multiple times
  - Lack of response
    - Lack of communication/understanding of resource sharing
Policies That Didn’t Work: Solutions

● **Challenge:** Lack of overdue fine policies for ILL
  ○ **Solution:** Created fine policy for all ILL student patrons
    ■ Blocked in 7 days email warns of hold on Fisher account, replacement invoice, $10 overdue fee
    ● If library accepts late return, $10 overdue fee remains

  ○ **Solution:** Created overdue notice structure for distance students
    ■ Explanation of importance to return on time
Policies That Didn’t Work: Solutions

- **Challenge:** Lack of communication/understanding of resource sharing
  - **Solution:** More frequent communication
    - 1 courtesy notice with option to renew
    - Overdue notices with option to request again
  - **Solution:** Clarified ILL policies concisely within emails, on website, and on Libguide
  - **Solution:** Updated Libguide (link included in emails) to enhance usability
Findings

- Positive patron (and staff) response

- 272 loans shipped to distance students as of 7/27/2015
  - 104 were items owned by Fisher
  - 168 were borrowed through ILL from 76 different libraries

- Shipped to 21 different CNR students and 27 different OCC students
New Opportunities

- Implemented UPS Campus Ship in Spring 2015
  - Ability to track shipments
  - Direct return to library rather than bookstore
  - Saves ~$6.00 per loan
    - Cost analysis in FY16

- Provided availability of ILL services to Faculty at OCC/CNR

- Piloting return packaging service on-demand for when students visit campus

- Ready to expand to other satellite programs when needed
Questions

Presentation is available on Fisher Digital Publications:

http://fisherpub.sjfc.edu/library_pub/32/