

East Carolina University

Tomorrow starts here.



# 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



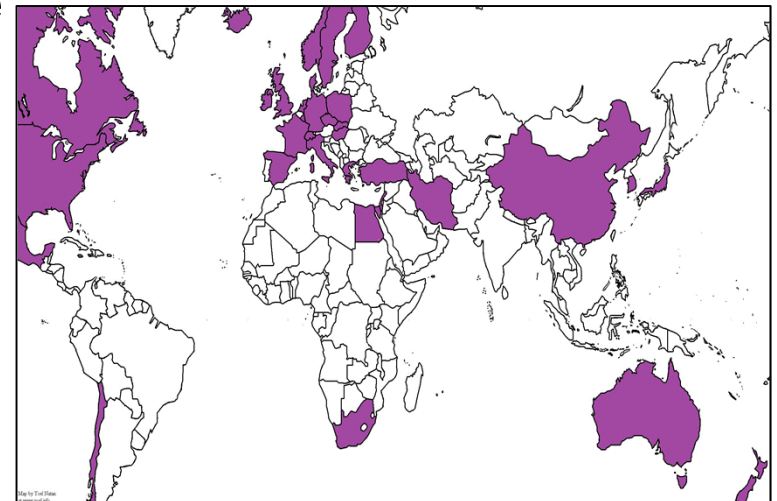
# Borrowing as a Reference Service

- 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

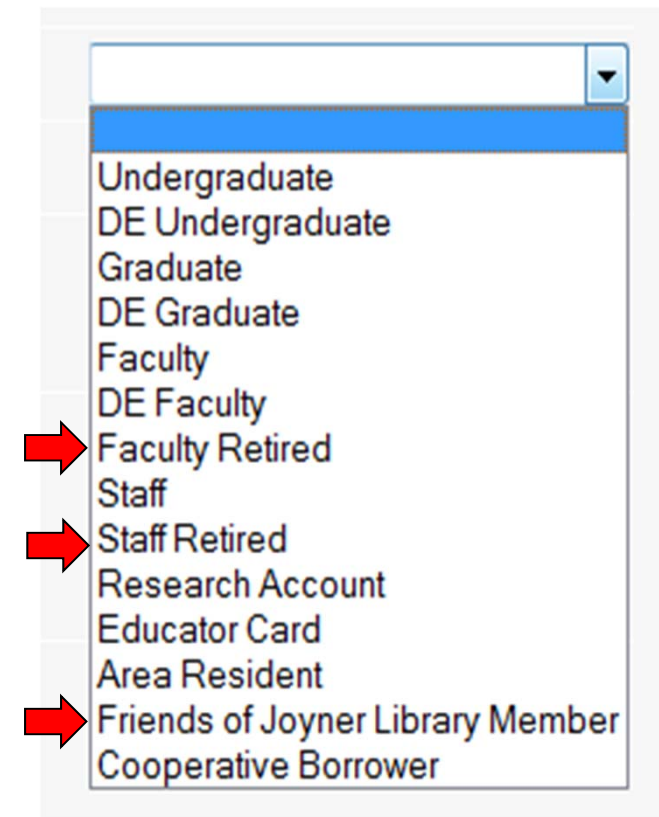
- Rationale:
  - No consortial borrowing network nearby
  - Nearest large library is about two hours away
  - Campus emphasizing higher quality research
- No limits on material types or numbers
- Statistics (2010/11):
  - 15% of Borrowing is for Undergrads
  - Articles: 333                      Loans: 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

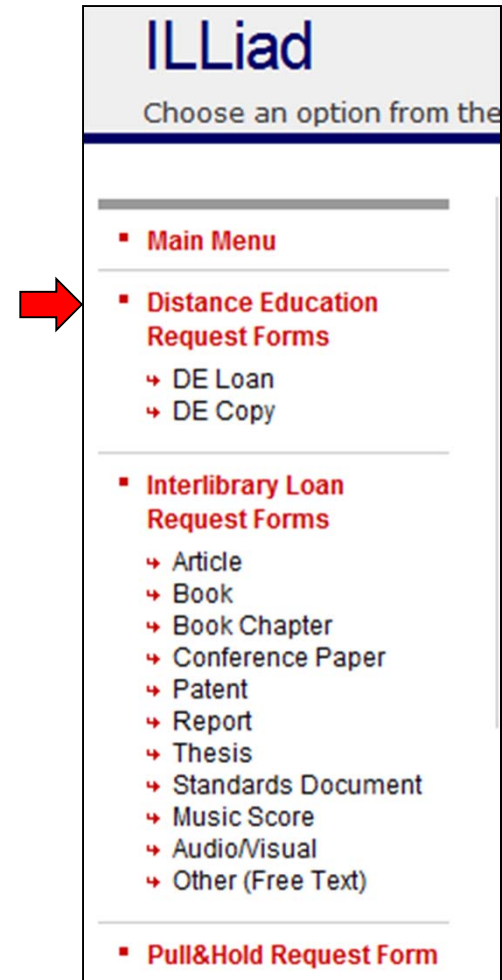


ILL Print or Fax Permitted with Limitations (see Note)  
ILL Secure Electronic Prohibited  
ILL Electronic (email) Prohibited  
ILL Record Keeping   
ILL Record Keeping Note US non-commercial only



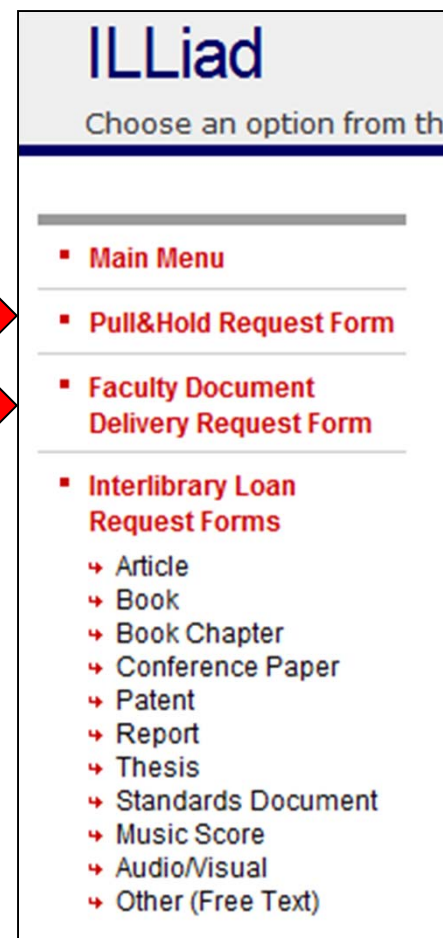
# DocDel for Off Campus Patrons

- **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



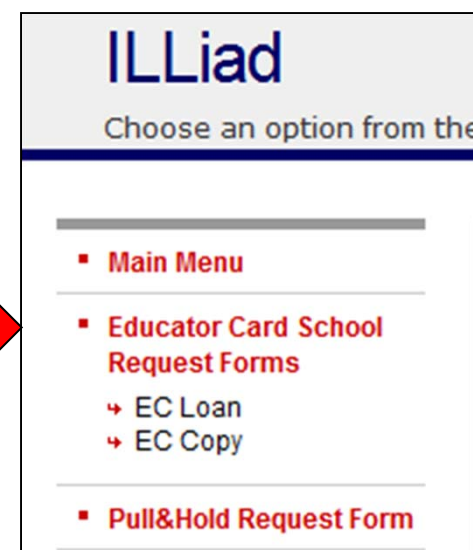
# DocDel for On Campus Patrons

- **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.



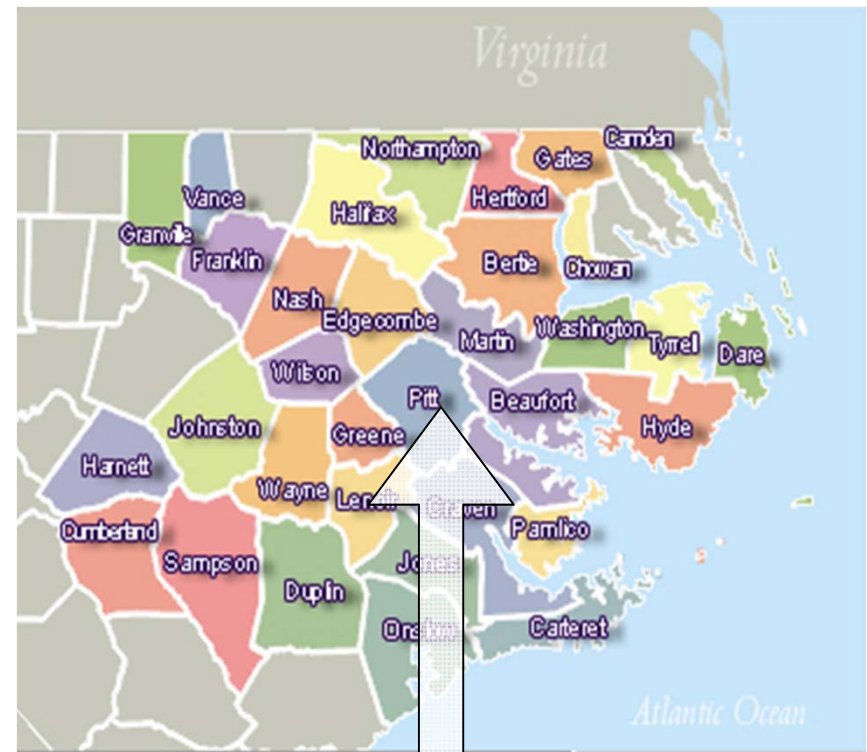
# DocDel for K-12 Schools in Region

- 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
  - Rapid/LL & 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 reciprocity
- 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

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## Questions?

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