Improving Patron Service in Interlibrary Borrowing, a Case Study*

Tanner Wray[1], Judith Tuohy[1], Heather Ballestad[1], & Brian Beecher[2]

The University of Wisconsin-Madison Memorial Library ILL Borrowing Office is a high volume borrowing office. Over the past 5 years the office has implemented technological and workflow changes to improve the delivery of ILL borrowing services to patrons. Technological changes implemented in the office include: patron-initiated requesting in the CIC Virtual Electronic Library and WorldCat, tight links between patron-initiated requests and an external patron database, OCLC direct request service, OCLC custom holdings, OCLC ILL Fee Management Service, web-based request forms, using the integrated library system to manage circulation, ARIEL, and CLIO ILL management software. Other changes include expanding communication with patrons via email, offering fewer office hours, abolishment of all paper files, physical rearrangement of the office, only accepting requests via electronic means, and routing selected ILL requests to Acquisitions for rush purchase and processing. Request volume has increased over time. Staff levels have not changed significantly. Turnaround time has decreased significantly and patrons receive their requested materials much faster. The poster will present the changes made by the ILL Borrowing Office and the impact on patron service. Plans for the future will be presented.

[1] Memorial Library, University of Wisconsin-Madison
   http://www.library.wisc.edu/libraries/Memorial/
[2] F.L. Weston Clinical Science Center Library, University of Wisconsin-Madison
   http://www.hsl.wisc.edu/weston/index.cfm

For further information contact:

Tanner Wray, MLS, AHIP	Judith Tuohy, MLS
Head of Access Services	Head, Interlibrary Loan
General Library System	University of Wisconsin-Madison
University of Wisconsin-Madison	Memorial Library
Memorial Library	728 State Street, Room 231
728 State Street, Room 166C	Madison, WI 53706
Madison, WI 53706	Phone: 608-262-2571
Phone: 608-262-7479	jtuohy@library.wisc.edu
twray@library.wisc.edu	

Memorial ILL Borrowing Office Changes

Change	Definition	When?
Web-based request forms	Patrons can submit requests via web	Aug 1994
Delivery Service	CIC (Big 10), Wisconsin libraries Established delivery services	July 1995
Separated Lending and Borrowing Departments	Memorial Library separated borrowing and lending into different offices	July 1995
ARIEL®	Implemented software that receives and prints incoming electronic images of articles	July 1995
Integrated Library System Circulation of ILLs, Email notification	Began using email to notify patron of ILL item availability, ILLs circulated through NOTIS® or Voyager® at Circ Desk	Jan 1996
Fewer ILL Office Hours	Office hours reduced from M-F 8-5 to 11-2	June 1996
***CIC VEL®**	Patrons use WebZ® to find records in Big 10 + University of Chicago Virtual Electronic Library® & place ILL requests. Pickup offered at 5 UW libraries	Nov 1997
OCLC® Custom Holdings	Groups of preferred lenders organized on OCLC®. Library invokes group(s) to easily generate lender strings	Dec 1997
OCLC® ILL Direct Request	Using ISO-10161 standard, service receives and then sends patron requests to the OCLC ILL service	April 1998
OCLC® IFM	ILL Fee Management service allows OCLC® users to pay and be paid for ILL charges through OCLC®	Nov 1998
***WorldCat®**	Patrons use WebZ® to find records in OCLC® Online Union Catalog & place ILL requests. Pickup offered at 5 UW libraries	Feb 1999
ARL Conference	ILL staff attended "From Data to Action"	Nov 1999
ILLs Converted to Rush Acquisitions	ILL Office refers selected ILL requests to Acquisitions for rush purchase	May 2000
E-requests Only	ILL Office stopped accepting paper requests	June 2000
***CLIO®**	Implemented ILL management software	Aug 2000
***Went Paperless**	Paper files abolished, software fully manages ILL requests and processes	Oct 2000
Circulation emphasizes ILL as recall alternative	Memorial Library Circulation staff recommend patrons use ILL borrowing as alternative to recalling borrowed books	Fall/Winter 2000
Office Rearranged	Equipment, staff rearranged to match new workflows	Nov 2000
CLIO Request®	Puts web requests into CLIO®, OCLC®	March 2001

4 significant changes which impacted turnaround time

Turnaround Time (for OCLC requests based on OCLC reports), Filled ILL Borrowing Request Volumes (from ARL statistics), and Staff Levels in ILL Borrowing Office

Year	1996/7	1997/8	1998/9	1999/00	2000/01*
Turnaround (Days)	15.3	15.0	12.9	12.6	10.8*
% over time**		-2%	-16%	-18%	-29%*
Filled Requests	14,955	18,650	21,403	25,942	30,000*
% over time**		25%	43%	73%	101%*
Filled Loans	11,514	15,084	17,321	20,332	21,300*
% over time**		31%	50%	77%	85%*
Filled Copies	3,441	3,566	4,082	5,610	8,700*
% over time**		4%	19%	63%	153%*
Total Staff	4	4	3	4	4
% over time**		0%	-25%	0%	0%
Academic Staff	1	1	1	2	1
Classified Staff	3	3	2	2	3

*2000/2001 projected based on July 2000-April 2001
**Cumulative changes since 1996/7.

---

4 Significant Changes which impacted turnaround time:

1 & 2. **CIC VEL® (Nov 1997) & WorldCat® (Feb 1999)**
Using WebZ®, patrons find records in CIC Virtual Electronic Library® and in OCLC® Online Union Catalog. Patrons then place ILL requests.
- ILL requests go directly into OCLC®
- No re-keying or searching by ILL staff
- 75% of monographic requests go directly to lenders

3. **CLIO® (Aug 2000)**
ILL management software used to manage requests and workflows.
- Produces patron-specific bookbands & cover sheets
- Reduces manual processes (less writing)
- Better invoice management
- Improved handling of patron inquiries
- Allowed office to go paperless

4. **Went Paperless (Oct 2000)**
All paper files abolished.
- Eliminated filing, file maintenance & filing errors

Future Plans:
- Electronic delivery of non-returnables (2001)
- Returnable ILL service for distance patrons (2001)
- Next generation ILL/DDS management system (ISO, NCIP, etc.) (2002?)
- Evaluate lender performance to rearrange OCLC® Custom Holdings (ongoing)