IN WITH THE NEW: ADAPTING TO CHANGE USING ILLIAD

Pamela Johnston

University of North Texas Libraries

March 20, 2013

SOME UNT FACTS

- Location: Denton, TX
  - 35 miles northwest of Dallas

- Enrollment: 35,700
  - Undergrad: 28,900
  - Grad: 5,000
  - PhD: 1,800
- Faculty: 1,400
- Staff: 2,400

- UNT Dallas
  - 2,200 students, faculty, staff

OUR LIBRARIES

- **Willis Library**

- **Eagle Commons Library (ECL)**

- **Media Library**

- **Discovery Park Library**

- **Library Annex**

- **Research Collections Library**

INTERLIBRARY LOAN STAFF

- Interlibrary Loan Librarian

- Borrowing
  - Borrowing Supervisor
  - Graduate Library Assistant (20 hours)
  - 4 Student Assistants (80 hours)

- Lending
  - Lending Supervisor
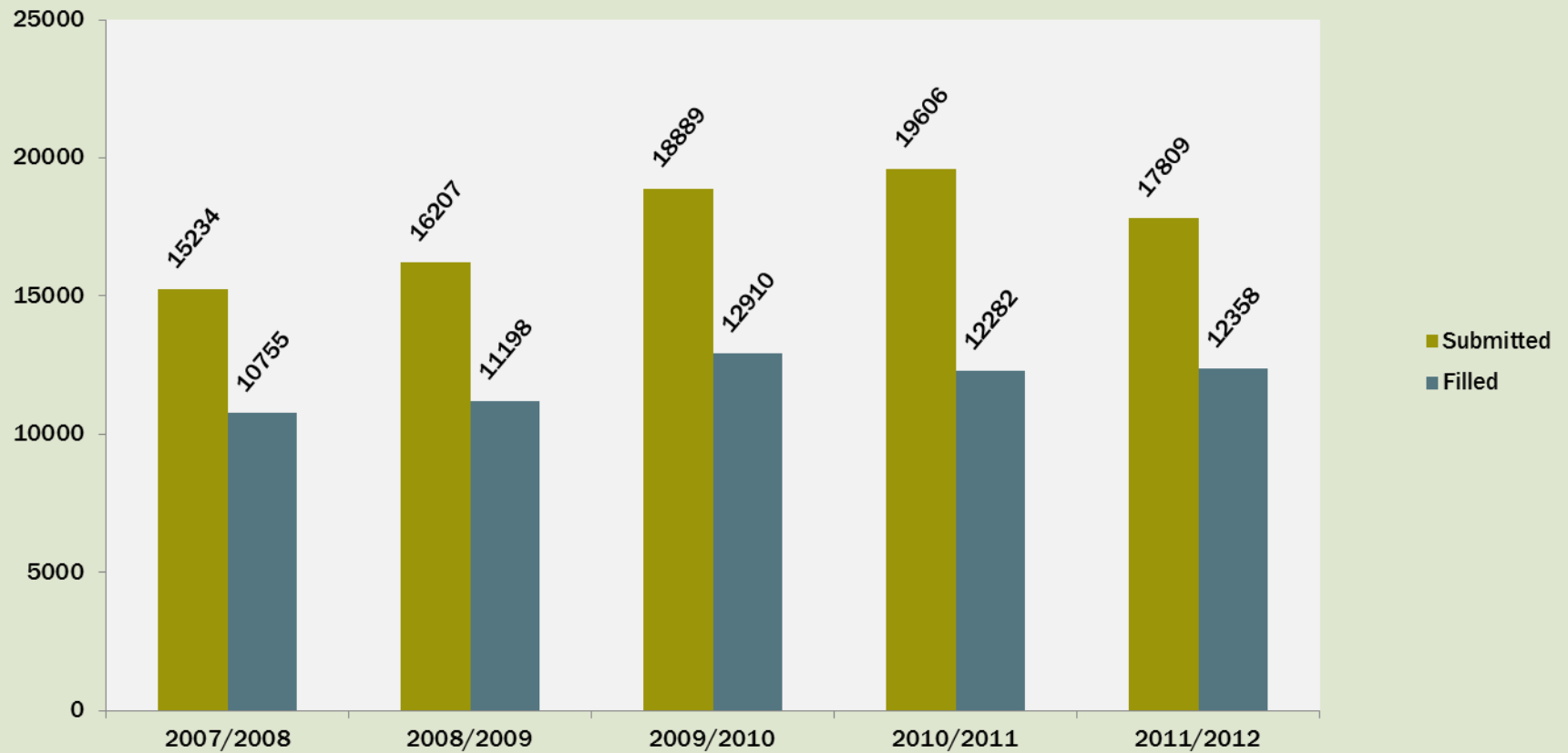 - 5 Student Assistants (60 hours)

DOCUMENT DELIVERY STAFF

- **Circulation Services Supervisor**
  - **Document Delivery Manager**
  - **Cataloging Maintenance Manager acts as backup**
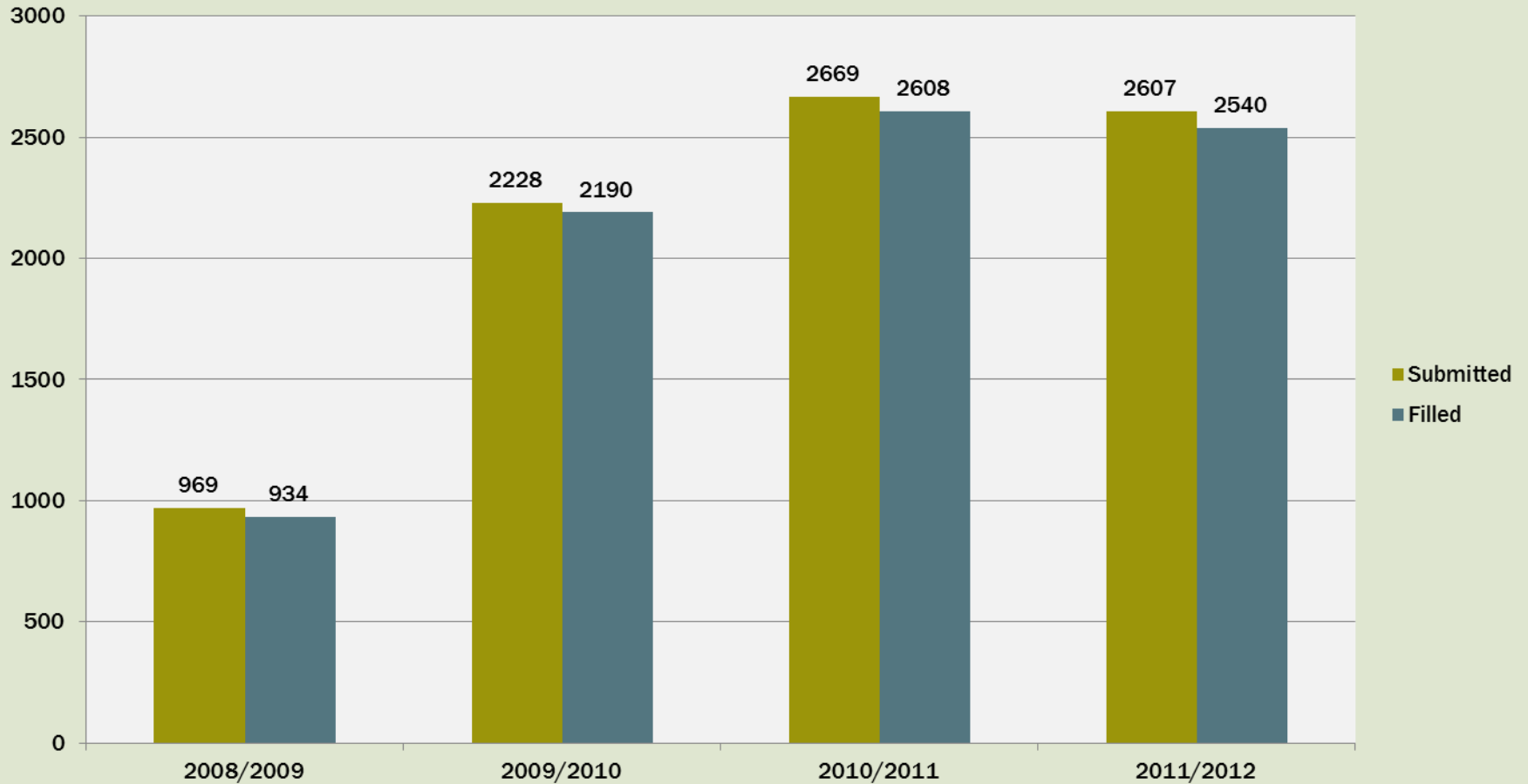 - **Student Assistants help as needed**

BRANCH LIBRARIES

- Library Annex (Facilities and Systems)
  - Remote Storage supervisor + student assistants
  - Lending & Doc Del tasks

- Discovery Park (Special Libraries Division)

  - 2 Librarians + student assistants
  - Lending & Doc Del tasks
  - Pick-up location for books borrowed thru ILL

- Eagle Commons Library (Public Services Division)
  - ECL staff assists with Doc Del tasks
  - Lending staff goes to ECL
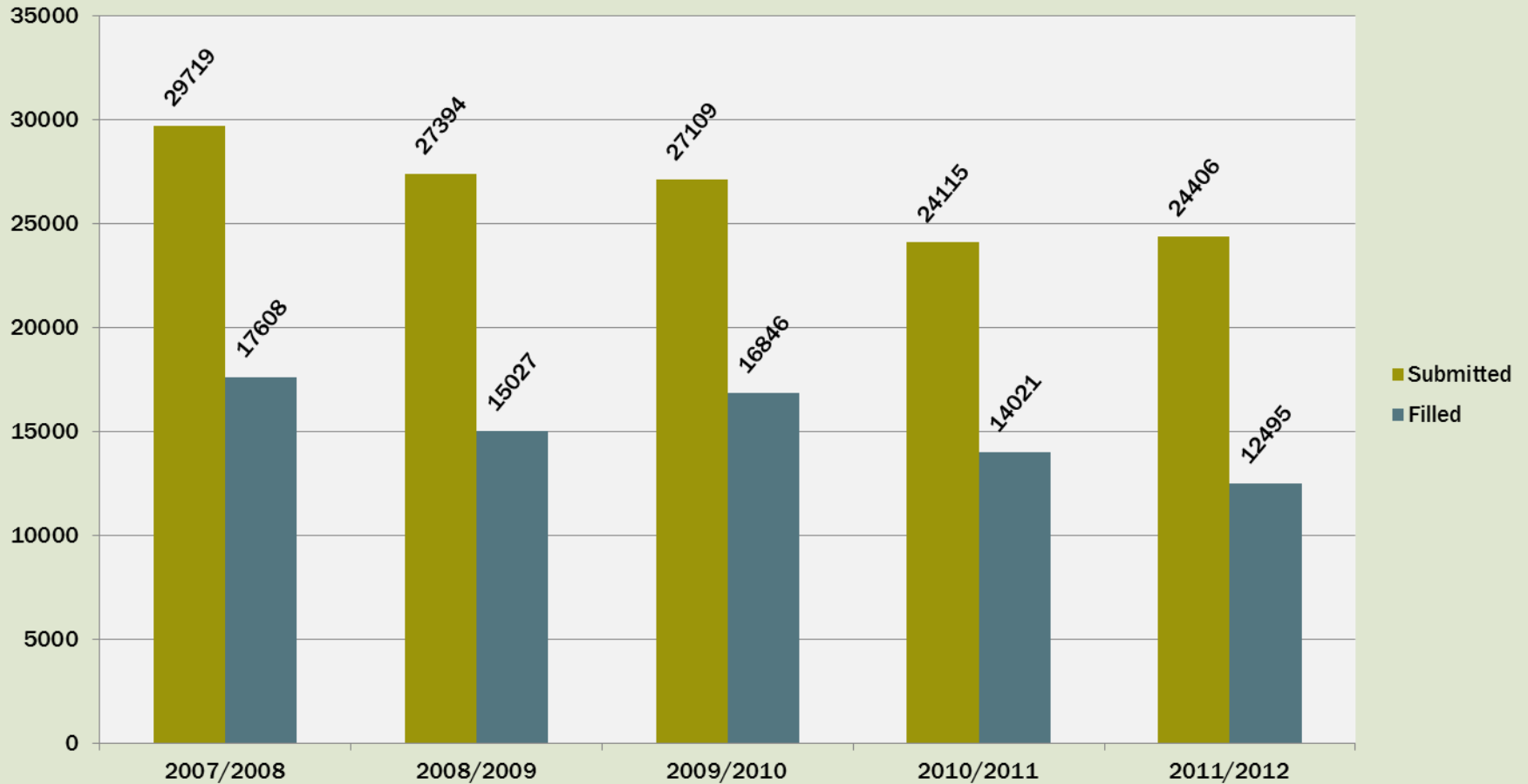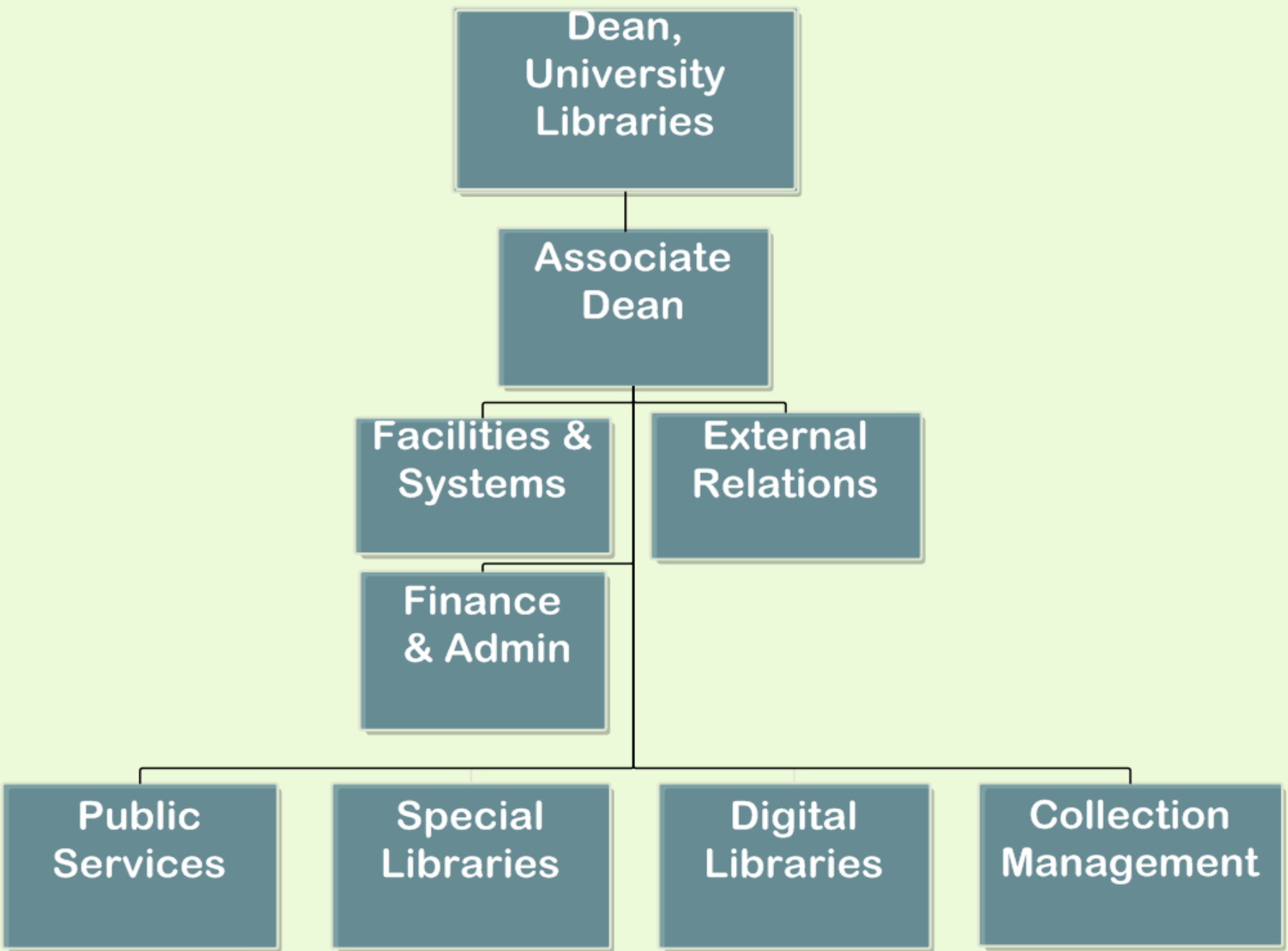
BORROWING

DOCUMENT DELIVERY

LENDING

CHANGING TIMES...

```
                    Dean,
                  University
                   Libraries
                       |
                   Associate
                     Dean
                       |
        ┌──────────────┼──────────────┐
   Facilities &                  External
    Systems                      Relations
        |
   Finance
   & Admin
        |
┌───────────┬───────────┼───────────┬───────────┐
  Public      Special      Digital      Collection
 Services    Libraries    Libraries    Management
```

BEFORE "ACCESS SERVICES"

Public Services
(Assistant Dean)

Circulation/Reserves/Stacks Management
(Circulation Manager)

Interlibrary Loan
(ILL Librarian)

AFTER

Public Services
(Assistant Dean)

Access Services
(Librarian)

Interlibrary Loan
(Librarian)

Circulation Services
(Library Associate)

Library Services Desk
(Library Associate)

Stacks Management & Assessment*
(Library Associate)

ACCESS SERVICES UNITS

- Interlibrary Loan
  - Borrowing/Lending
  - Document Delivery
- Circulation Services
  - Document Delivery
  - Catalog Maintenance

ACCESS SERVICES UNITS, CONT'D

- Library Services Desk
  - Combined Circulation/Reference services
  - Fines
  - Reserves
- Stacks Management & Assessment*
  - Shelving & Shifting
  - LibPAS
  - Outreach

GETTING (RE)ORGANIZED

- Restructuring
  - Created 4 separately managed units
  - Staff reclassifications
  - Revised Performance Agreements (job descriptions)

- Cross-Training
  - Shelvers cross-trained to work at Library Services Desk
  - Reference staff at Library Service Desk have Circulation training
  - Interlibrary Loan GLA and Lending Supervisor assist at Library Services Desk as needed
  - Back-up training for various duties

- Communication
  - Access Services Management Team meets every two weeks
  - Access Services personnel meet 2 to 3 times per semester
  - Meetings for special projects

ACCESS SERVICES RETREATS

- Once per semester; full or half-day
- Location: Alternate campus locations
- Activities:
  - Wonder Wall – Accomplishments
  - New Ideas – What services would we like to provide
  - Assessment – What's working, what's not
  - Other Activities
    - Yoga
    - Stress Management
    - Games
  - Lunch

ROAD TRIPS!

Site Visits:

- UT–Arlington (IUA)
- Texas A&M (TXA)
- UNT Health Science Center (TOM)
- Dallas Public Library (IGA)
- Ft. Worth Public Library (IFA)
- Frisco Public Library (FHP)
- Denton Public Library (QS3)

SOME ILL & CIRCULATION HISTORY

- Under previous Library Administration, we were separate units of the "Materials Access & Preservation Department".

- ILL and Circ offices were adjacent, with ILL staffing our part of a public service desk

- Circulation checked out ILL materials after 6:00 and on weekends

- Library Materials Delivery Service: Retrieve books/articles among our libraries.

- In Spring 2009, Distance Learning and Faculty E-Delivery services were implemented in ILLiad. Circulation staff process these requests.

MOVING ALONG…

- New ILL Office
- Expanded workspace for Circulation staff
- Relocation of Reserves collection

- Service Changes
  - ILL reception desk
  - Webcirc module for Library Services Desk
  - ILL staff wraps U.S. Mail

OVERVIEW OF SERVICE CHANGES

- Faculty Book Delivery Service

- Articles for Everyone

- UNT-Owned Books

- Electronic Resource delivery vs. cancellation

- Demand Driven Acquisitions

FACULTY BOOK DELIVERY SERVICE SUMMER 2012

- Goals:
  - Provide enhanced service to Faculty
  - Complement our Faculty E-Delivery service which we've been doing since Spring 2009.
  - More standardized service: We've been delivering ILL books to faculty offices for several years
  - Increase Circulation stats

FACULTY BOOK DELIVERY

- **Who is Eligible**
  - **Regular full-time faculty**
  - **Adjunct faculty**

- **What Will We Deliver**
  - **Regular circulating items**
  - **Bound journals**
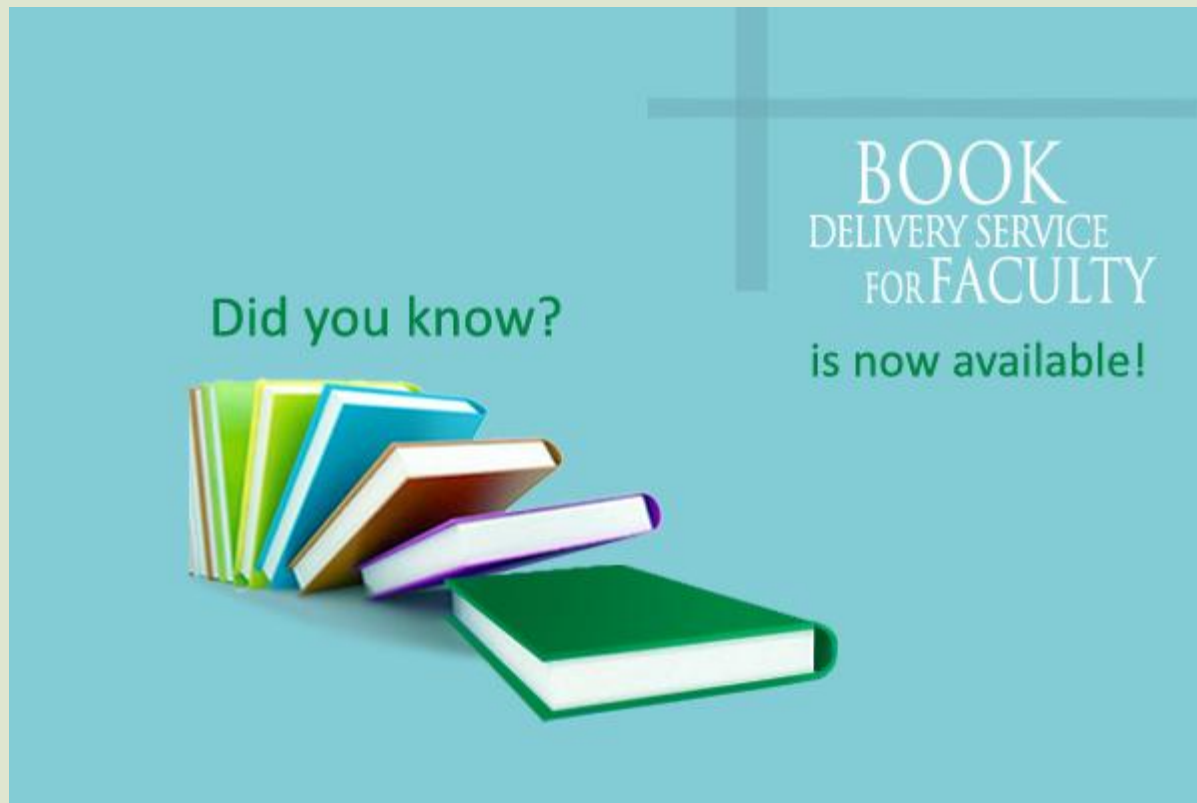 - **Non-Circulating items**

FACULTY BOOK DELIVERY, CONT'D

- Deliver via Access Services courier to main academic department office. Courier obtains a signature at delivery point.

- Schedule
  - M, W, F between 10 - 2

- Turn-Around Time
  - 48 hours

FACULTY BOOK DELIVERY ILLIAD PROCESSING

- New ILLiad queues:
  - Borrowing: Awaiting Faculty Book Delivery processing
  - Doc Del: In Faculty Book Searching

- ILLiad Delivery Location
  - Use existing "Deliver to Office" location

- Custom Email:
  - Use existing Custom Emails to retrieve materials from branch libraries
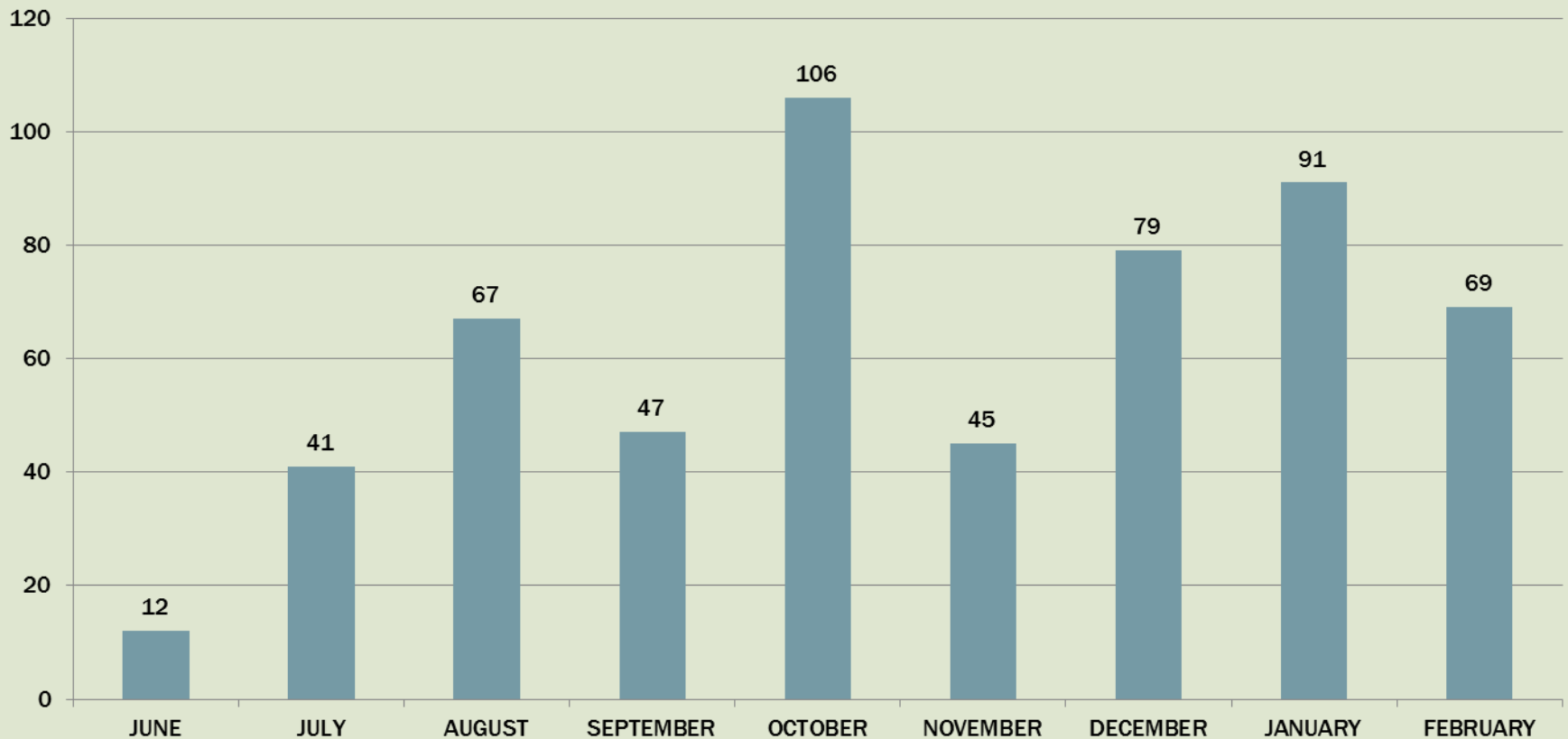 - Book Delivery Notification

MARKETING

LIBRARIES' HOME PAGE

FACULTY BOOK DELIVERY
HOW ARE WE DOING?

UNT BOOKS DELIVERED TO OFFICE

Month	Books Delivered
JUNE	12
JULY	41
AUGUST	67
SEPTEMBER	47
OCTOBER	106
NOVEMBER	45
DECEMBER	79
JANUARY	91
FEBRUARY	69

ARTICLES FOR EVERYONE!

- A Bit of History
  - Spring 2009: Started Faculty E-Delivery Service + ILLiad for Distance Learning
  - Fall 2010: LMDS requests forwarded to Circulation
  - Spring 2013: Began "Articles for Everyone" pilot

- Goals:
  - Provide faster fulfillment for patrons
  - As more collections are moved to Remote Storage, use ILLiad as the primary means to request articles
  - Increase our filled requests

ARTICLES FOR EVERYONE ILLIAD PROCESSING

- Use/Modify Existing Borrowing Queues:
  - Awaiting Circulation Processing
  - Awaiting Distance Learning/PHD Processing
  - Awaiting Faculty E-Delivery Processing

- Interlibrary Loan staff forward requests to appropriate queues

- Document Delivery staff route requests back to ILL staff when needed

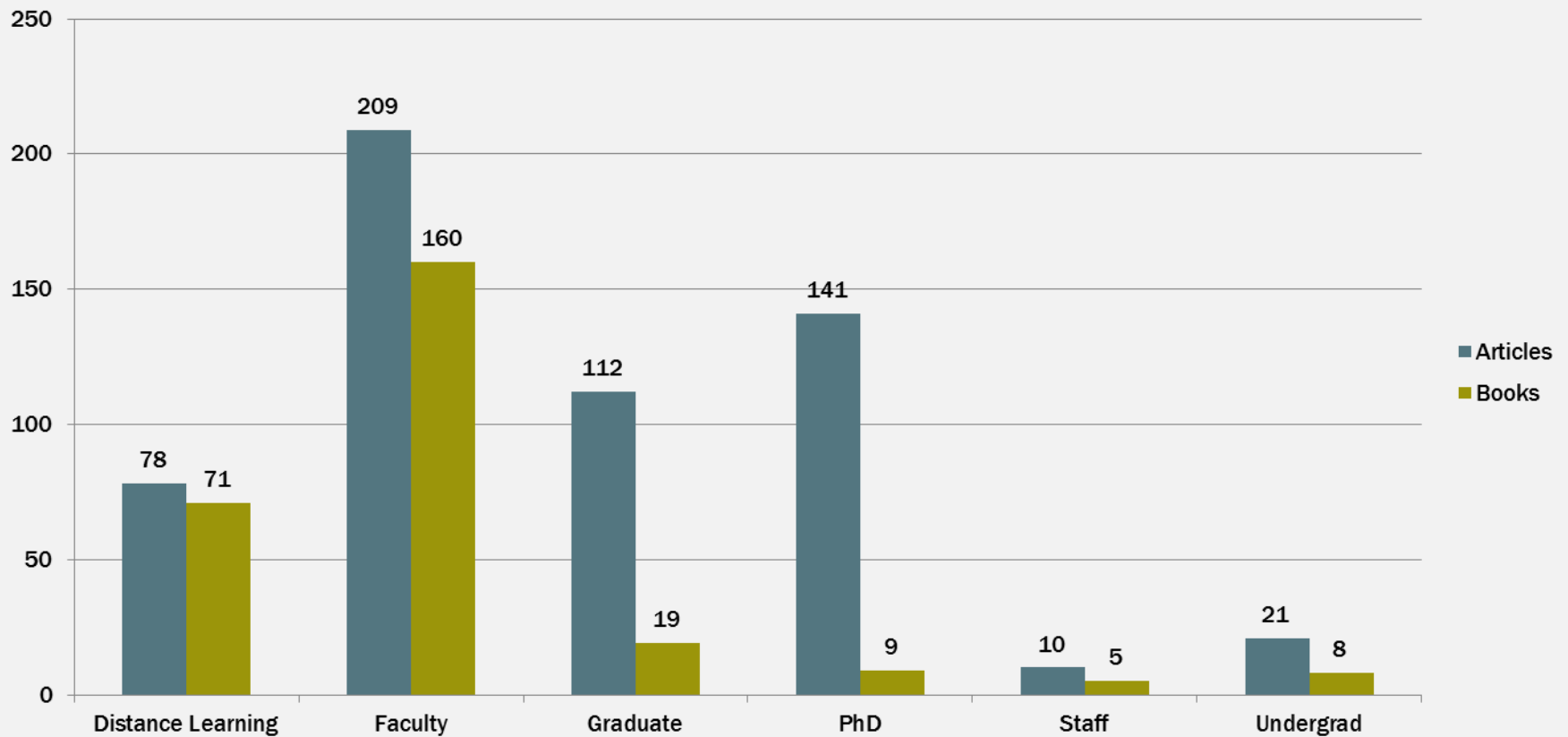# UNT-OWNED BOOKS

- Available Items
  - Usual procedure was to cancel item; inform patron of call number & location
  - Route to "Awaiting Circulation Processing" queue
  - Circulation places a hold on item
  - Book is retrieved and placed on hold shelf for patron

- Checked Out Items
  - Usual procedure was to cancel item; ask patron to put a recall on book
  - Send Custom Email; Circulation puts a recall on our copy
  - ILL requests a copy from a free lender

ARTICLES/BOOKS
# HOW ARE WE DOING?

DOCUMENT DELIVERY FILLED REQUESTS

Category	Articles	Books
Distance Learning	78	71
Faculty	209	160
Graduate	112	19
PhD	141	9
Staff	10	5
Undergrad	21	8

ELECTRONIC RESOURCES DELIVERY VS. CANCELLATION

- Goals
  - Provide faster fulfillment to patrons
  - Decrease the number of cancellations
    - ER cancellations accounted for over 30% of article cancellations the past two years

CANCELLED E-RESOURCES REQUESTS

**Cancelled: Available in Electronic Resources**
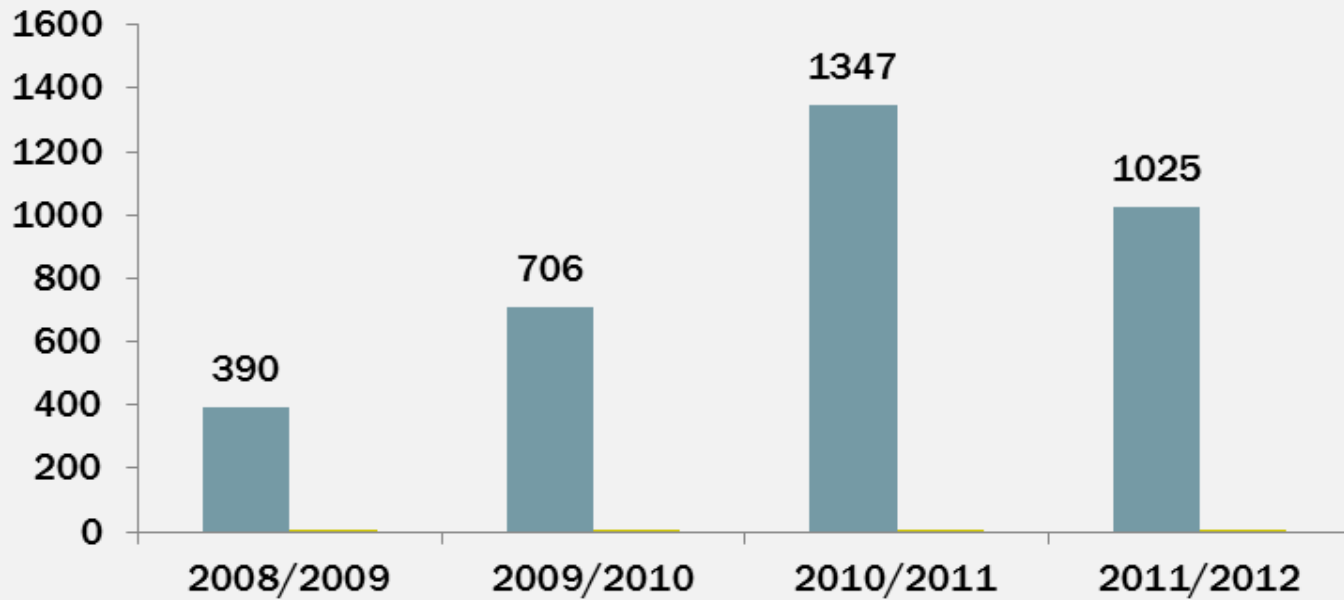
E-RESOURCES ILLIAD PROCESSING

Processing articles found in our Electronic Resources:

- Lender: UNTDB (copyright payer)
- System ID: OTH
- Save PDF with the Transaction Number
- Change request to status "Request Sent"
- Check In From Lending Library
- Import PDF into Odyssey
- Deliver to Patron

UNTDB LENDER
HOW ARE WE DOING?

316 PDF'S DELIVERED

Category	Value
Dist Learning	43
Faculty	37
PhD	91
Graduate	106
Staff	4
Undergrad	35
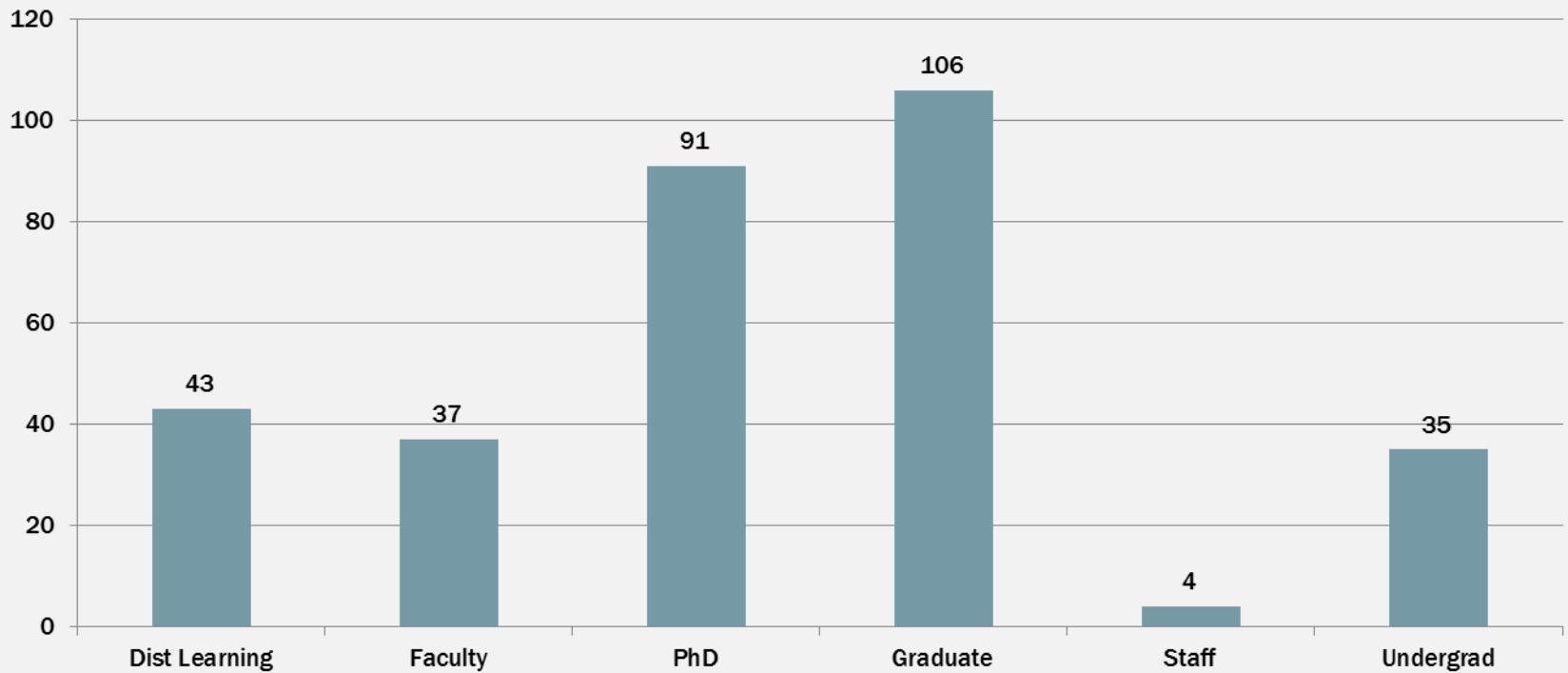
E-BOOKS
DEMAND DRIVEN ACQUISITIONS

- Criteria
  - Book needed by Distance Learning student w/Home delivery location
  - New publications not available via ILL
  - Books predominantly in e-book format
  - Books needed repeatedly by patrons
- "Pam's requests" queue
- Order via Gobi
  - Standardized note in ILLiad: "Ordered via DDA"
  - Email patron that e-book is on order
  - Notify patron when available

LENDING CHANGES

- Email Overdue notices

- More electronic delivery
  - Odyssey
  - Article Exchange
  - PDF via Ariel

- Loan Media
  - Media wanted to increase their Circulation stats
  - Academic libraries only
  - Lending sends ILLiad Custom Email to Media Library staff
  - Same checkout period as books
  - 450 items loaned in one year

ASSESSMENT

- ILL & Doc Del staff met in February to review usage, what's working, changes needed

- Next assessment meeting in May

- Will continue as pilot programs through December 2013

- Must assess if service is sustainable with our staffing levels

FUTURE PLANS

- Collections
  - Expect to move more items to Remote Storage (about 250,000 volumes)
  - Access Services staff assist in catalog maintenance, packing, and shifting

- Streamlining ILL and Doc Del operations at branch libraries
  - Odyssey helper
  - End use of ILLiad client
  - Reduce training needs

FUTURE PLANS, CONT'D

- Summer 2013: Online holds

- End use of the Library Materials Delivery Service request form; all patron requests thru ILLiad or online holds

- ILLiad Modifications

- Additional Staff training
    - Customization Manager

THANK YOU!