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:

Edit Row

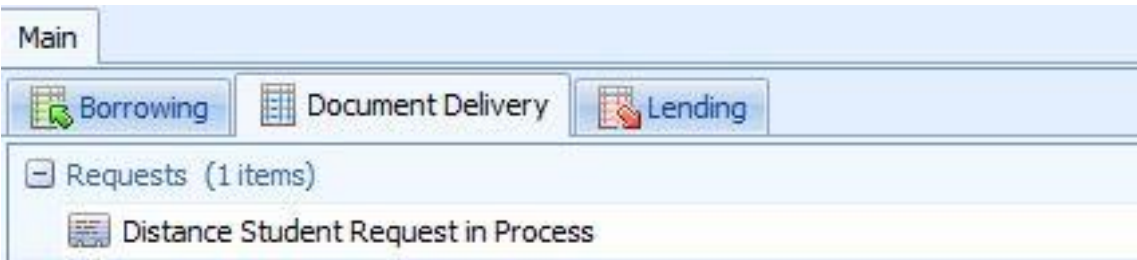|	
RuleNo	13
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	u.Status = 'OCC' and t.RequestType = 'Loan'
NewProcessType	Doc Del
NewTransactionStatus	Distance Student Request in Process
RuleDescription	This rule moves requests received from OCC Students into the Doc Del Processing queue

ILLiad Distance Student Processing

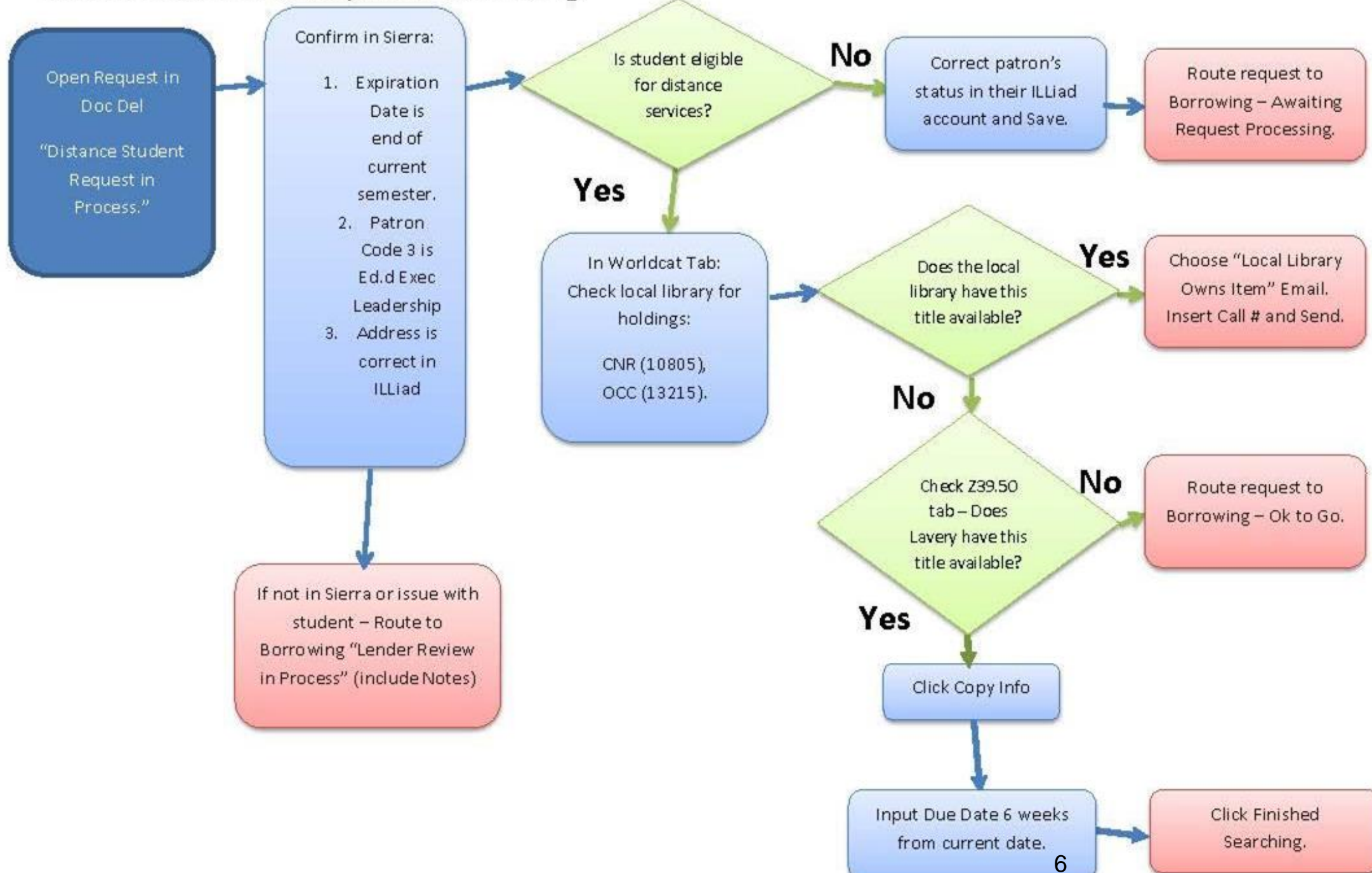- Distance students select status (OCC, CNR) and provide shipping info upon first request:

- 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.d Exec Leadership
3. Address is correct in ILLiad

↓ (from Confirm in Sierra box)

If not in Sierra or issue with student – Route to Borrowing "Lender Review in Process" (include Notes)

→

Is student eligible for distance services?

No → **Correct patron's status in their ILLiad account and Save.** → **Route request to Borrowing – Awaiting Request Processing.**

Yes ↓

In Worldcat Tab: Check local library for holdings:

CNR (10805), OCC (13215).

→

Does the local library have this title available?

Yes → **Choose "Local Library Owns Item" Email. Insert Call # and Send.**

No ↓

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

No → **Route request to Borrowing – Ok to Go.**

Yes ↓

Click Copy Info

↓

Input Due Date 6 weeks from current date.

→

Click Finished Searching.

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:

Edit Row	
RuleNo	81
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Post Receipt Processing
MatchString	u.Status = 'OCC' and t.RequestType = 'Loan'
NewProcessType	Doc Del
NewTransactionStatus	Awaiting DD Stacks Searching
RuleDescription	This rule moves requests for books borrowed and received for OCC Students into the Doc Del processing queue

- 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

9

TN: 149823

Emma,
You've borrowed the following title through
St. John Fisher College:
Title: Pride and Prejudice

Author: Austen, Jane

This title is due:
7/15/2014

Please return this title to the OCC Library. They will return the book to the SJFC campus.

Have questions? Contact us!
Visit our online guide:
http://libguides.sjfc.edu/ill
Email: ill@sjfc.edu
Phone: 585-385-8106

Mailing Info for UPS – Bookstore Use

Emma Student
3690 East Avenue
Rochester, NY 14618

OCC Student | TN# 149823

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:
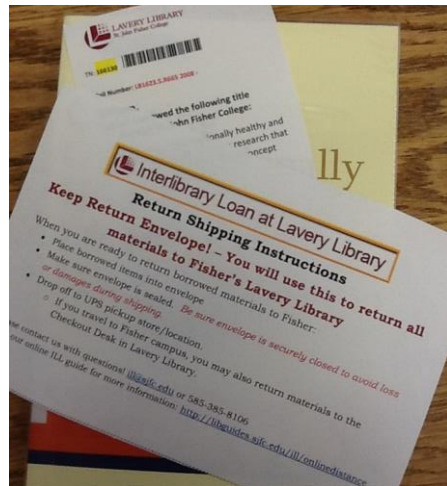
- Bookstore printed prepaid UPS return label, sealed box, mailed

10

- Items returned at a UPS drop-off and brought over by Bookstore

CNR Shipping Procedure: Return Instructions

Interlibrary Loan at Lavery Library

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

----
OCC Student | TN# 149823

Student workers: Do not check in.
Give to supervisor upon return!

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

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
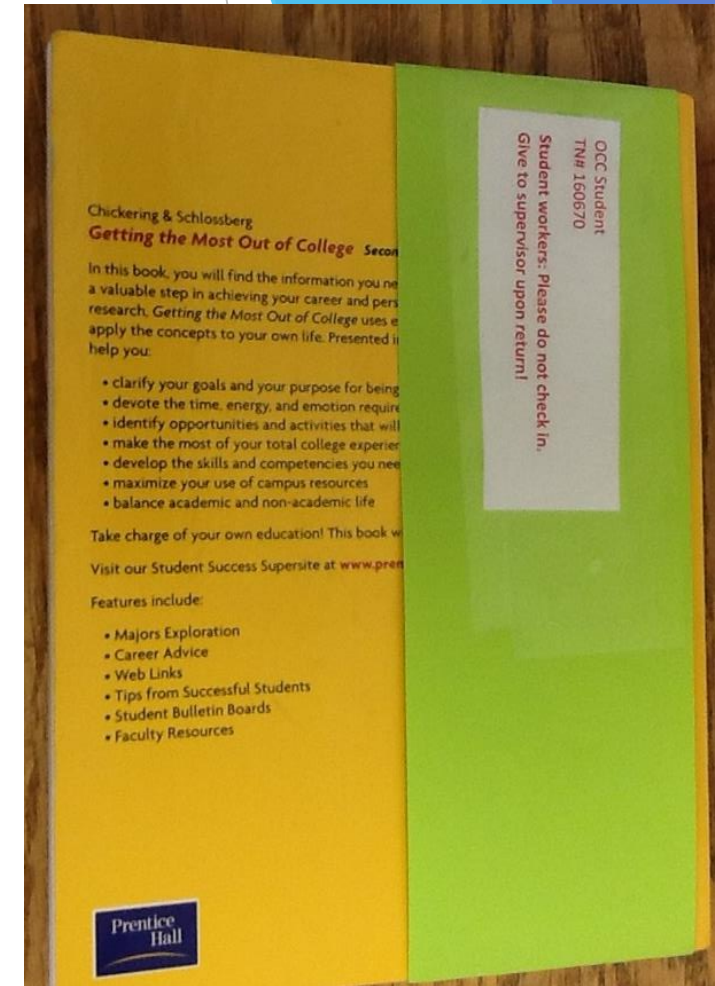
2014 Policy Assessment: What Worked

- 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

2014 Policy Assessment: What Didn't Work

- 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

Total Distance Student Requests

CNR: 99
OCC: 173
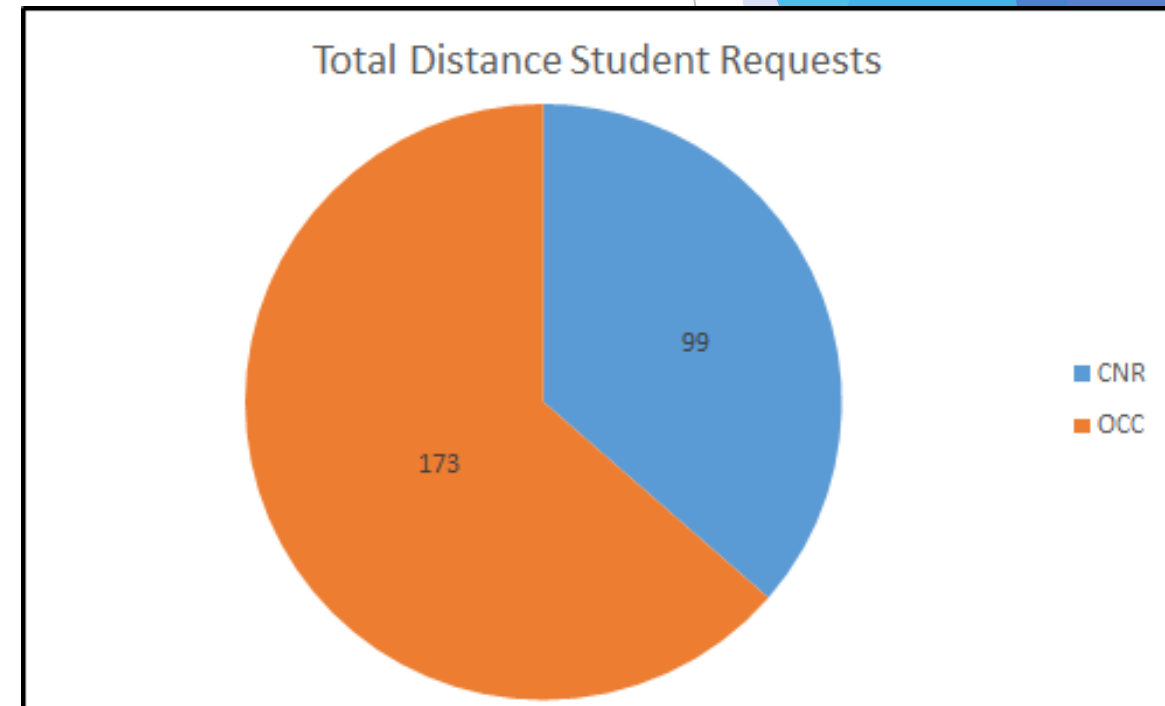
New Opportunities

- 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/