



ILL Requests Are Going to Double? Managing the Impact of WorldCat Local on ILL

CJ de Jong

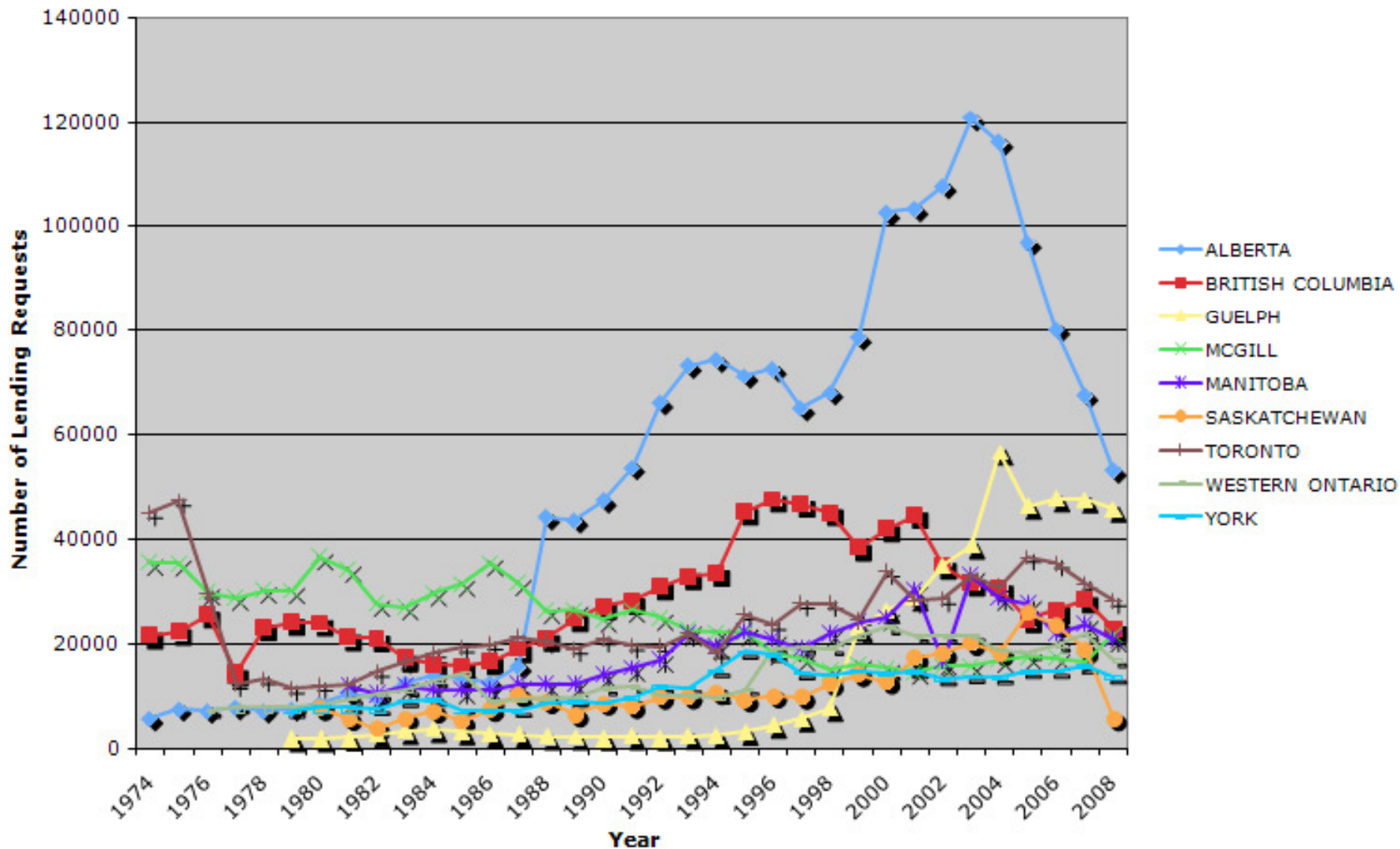
Access Services Coordinator
University of Alberta Libraries



- Trends for borrowing and lending in Canada, ARL Libraries
- ILL workflow at the U of A
- WorldCat Local
- WorldCat Local Implementation
- Challenges & Strategies
- Next steps...

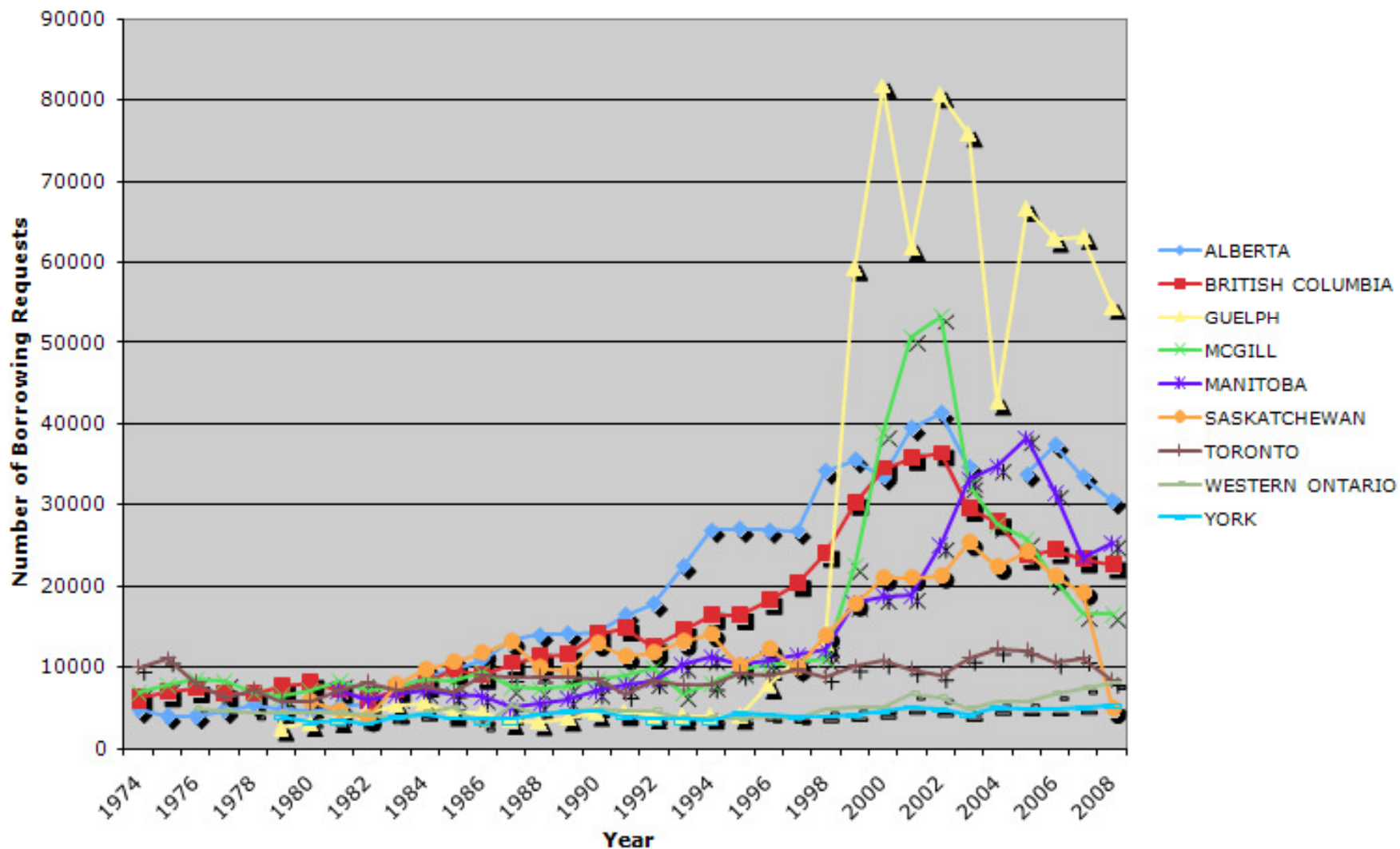


Lending Requests for Select Canadian ARL Institutions by Year





Borrowing Requests for Select Canadian ARL Institutions by Year





ILL Trends & WorldCat Local

- University of Washington Libraries

“large shift in the volume and type of requests as well as shifts in the demographics of ILL patrons”

(Deardorff and Nance, p. 178)

Deardorff, T. & Nance, H. 2009. Worldcat Local implementation: The impact on interlibrary loan. *Interlending & Document Supply*, 37.4, 177-180.



- 1st Year
 - Returnables, up 150%
 - Nonreturnables, up 41%
 - Returnables became larger portion of workload, changing previous trend
 - 339% increase from graduate students
- 2nd Year
 - Increases continue at reduced rate
- Authors report other WCL Libraries have indicated an increase in ILL stats



UNIVERSITY OF
ALBERTA

What is happening at the U of A?



University of Alberta

- Students '08-'09
 - Undergraduate F/T: 28,101
 - Undergraduate P/T: 2,047
 - Graduate F/T: 5,203
 - Graduate P/T: 1,485
- Total: 36,836 students



University of Alberta

- Academic Staff: 3,087
- Academic Assistants: 657

Total: 3,744 academic staff



Library – Access Services

- Interlibrary Loan/Document Delivery
- Access Subunit (Discharging/Routing...)
- Shelving
- Stacks Maintenance & Pac Requests
- Book and Record Depository (BARD)

29.5 FTE Staff

5.5 FTE Recurring Term Staff

25 FTE Casual Student Staff



ILL/DD

- Lead Hand – 1 FTE
- Borrowing/Lending Searchers – 4.4 FTE
- BARD Borrowing Searchers – 4.5 FTE
@ 20%
- Retrieval / Scanning / Mailing clerks – 3 FTE
- Internet processing student – 12hrs/wk



ILL '09-'10 Stats

Borrowing

- Loans: 5,907
- Copy: 10,371
- Total: 16,278 filled
- 21,153 requests received

Lending

- Loans: 17,743
- Copies: 28,646
- 46,389 filled
- 62,833 requests received



ILL Workflow #1

- ILL Office Staff - Morning
 - Start with lending search
 - finish queue
 - Then, borrowing search
 - leave 60 requests
 - Then, internet search
 - All requests received before 11:30am to be done by end of day



ILL Workflow #2

- Afternoon, begins with lending search
 - Finish queue
- After, afternoon tasks
 - Reports (e.g. stale dated), OCLC/Docline
 - ReceiveFTP, bookbanding
 - Purolator , mail
 - invoices
 - internet search (finish up to 11:30am pick slips)



ILL Workflow #3

- BARD Staff (4.5 FTE @ 20%)
 - Each person carries out up to 6 hours of borrowing searching
 - 1 person, up to 3 hours in morning
 - 1 person, up to 3 hours in afternoon
 - Queue is cleared each day
 - More time available than necessary



ILL Workflow #4

- Retrieval/Scanning Clerks (3 FTE)
 - 2 on campus, 1 at BARD
 - Responsible for retrieving materials for mailing, scanning, photocopying
 - Mailing material using Purolator and Canada Post.
 - Workload is prioritized.



WorldCat Local (WCL)

- <http://worldcat.org>
- <http://www.oclc.org/worldcatlocal/>
 - Discovery tool for local and global holdings
 - Now also includes indexing of a number of databases
- <http://ualberta.worldcat.org/>
 - University of Alberta's implementation



Rolling out WorldCat Local

- WCL Team – participate!
- Placing it on the website - don't hide it!

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Exhibits

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Body Puzzle



Body Puzzle is an exhibition of artworks works based on body casting by students in Visual Fundamentals 137, Agnieszka



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in

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Stop

SAM STEELE



Superintendent Sir Samuel Benford Steele of the NWMP was a world renown hero of the Canadian West.

This collection includes a wide variety of photographs and personal papers from Sam Steele, his family and long-time Steele family friend Captain Roger Pasick.

SIR SAMUEL STEELE COLLECTION



Rolling out WorldCat Local

- WCL Team – participate!
- Placing it on the website - don't hide it!
- Integrating ILL system in WCL
- Monitor requests placed through WCL



PAL-12116345

AEU

PATRON NOTIFIED
OONL

ARTS
UNIV OF ALBERTA/CAMERON LIBRARY
INTERLIBRARY LOANS

CA

ATTN:
PHONE:
FAX:
E-MAIL:

SUBMITTED: 2010-03-10 18:48:23
PRINTED: 2010-05-14 13:28:50
REQUEST NO.: PAL-12116345
SENT VIA: World Wide Web
PATRON TYPE: Graduate

PAL	REGULAR	COPY	JOURNAL
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TITLE: SC B AC B STRIC B YA RA C B GA DAR SC B ANA
PUBLISHER/PLACE: Gu C B rjara Grantharatna Ka C B rya C B h Amada C B va C B da
EDITION: l. a C B vr C B % tti.
DATE: 1994
AUTHOR OF ARTICLE: Ya C B jn C B ika, Hasu

NOTES: Referred by: WorldCat Local

DELIVERY: Pickup: Rutherford Humanities and Social Sciences

REPLY: E-mail:

NOTES TO CLIENT: Since you did not respond to our request for more information, we are not able to proceed with this order. This request is cancelled.



Feb. 17 – Apr. 26, 2010

- Total requests submitted through WCL: 211
- Distinct users: 91
 - Faculty = 20
 - Staff = 10
 - Graduate = 36
 - Undergraduate = 22
 - Distance = 1
 - UA Augustana = 2



Challenges

- New to ILL
- New vacation policy for '09/'10
- Performance appraisals
- Voluntary Retirement Incentive Program
/ Regular Retirements
 - 7 Staff retiring by end of July, '10



Strategies #1

- Benchmarking
 - How much can be done?
- Establish cues for monitoring workload
 - Are things getting done?
- Clear expectations
 - Setting priorities, areas of responsibility



Strategies #2

- Target backlogs
 - E.g. List exhausted
- Taking full advantage of ILL system
 - E.g. OCLC Borrowing
- Training of staff
- Merging with Access Subunit



Next steps...

- Monitoring WCL ILL stats
 - Returnables vs Nonreturnables
 - User profiles
 - Cancellation reasons
- Monitoring cost of ILL
- Continue monitoring workflow



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Questions?

CJ de Jong

cj.dejong@ualberta.ca

Graphs Slides 3 and 4:

Source: Machine-Readable Files of ARL Statistics Data, retrieved at
<http://www.arl.org/stats/annualsurveys/arlstats/mrstat.shtml>.

Prepared by CJ de Jong, Access Services Coordinator, University of Alberta Libraries.