SWAN Interlibrary Loan Users Group
Wednesday, October 2, 2019
9:30 am – 12:00 pm
RAILS Main Meeting Room
125 Tower Drive, Burr Ridge, IL 60527

NOTES

1. Introductions

    Attendees introduced themselves, members attending represented 15 libraries.

First	Last	Library
Alex	Altan	Prairie State College
Barb	Bronkala	Alsip-Merrionette Park Public Library District
Morgan	Burns	Messenger Public Library of North Aurora
Jeri	Cain	Carol Stream Public Library
Peggy	Carey	National University of Health Sciences (Learning Resource Center)
Patricia	Czuba	Indian Prairie Public Library District
Sandy	Frank	Thomas Ford Memorial Library
Kryztal	Gonzalez	Franklin Park Public Library District
Carly	Guido	Franklin Park Public Library District
Toni	Jacobs	South Holland Public Library
Mimi	Johnsen	Bloomingdale Public Library
Susan	Krass	Geneva Public Library District
Julie	Lombardo	Woodridge Public Library
Mary	Malach	Messenger Public Library of North Aurora
Michael	McGlauchlen	Bloomingdale Public Library
Helen	Pinder	SWAN
Jane	Ruback	LaGrange Public Library
Debbie	Sheehan	Indian Prairie Public Library District
Holly	Szpara	Saint Charles Public Library District
Dawne	Tortorella	SWAN
Deborah	Walsh	National University of Health Sciences (Learning Resource Center)
Renee	Walther	Carol Stream Public Library

2. Find More Illinois – brief demo & Q&A, Jane Plass, RAILS

Jane Plass provided an overview of Find More Illinois and how it fits into the resource sharing picture in Illinois. Additional information, including information on fee structure and a list of participating members is available at: https://findmoreillinois.org/

The first SWAN library, Frankfort Public Library, has joined Find More Illinois. With Frankfort joining, the technical setup include connection of the SWAN catalog and authentication via Open Athens has been completed.

Currently there are 4 shared catalogs connected to Find More Illinois: PrairieCat, Rock River, RSA, and SWAN, as well as several standalone libraries including Addison & Winfield. The University of Illinois at Chicago is participating, as well as multiple school libraries in the Sterling area.

With the growth of Find More Illinois, RAILS has made the decision to phase out Share Illinois when one more shared catalog joins FMI. RAILS staff provide support for FMI with support tickets being submitted to RAILS.

Jane showed how the system groups items and then drills down to results of individual catalog. It pulls back live holdings information. Depending on library preference, patrons can place requests directly through the system. Once the patron is authenticated, the system combines the item information and patron information to create the ILL requests. Much like OCLC WorldShare ILL, the system builds a lender string and sends the request to one library at a time.

Other states have similar resource sharing networks in place using ShareIt software from Autographics. These include Kansas, Wisconsin, Indiana, Vermont, and New Hampshire. In the future their may be opportunities to facilitate resource sharing across these networks. When RAILS agrees to participate, individual libraries will be able to opt-in/opt-out of this out-of-state lending.

Look for future training announcements and recorded overview sessions on L2 and the FMI website.

1. Introductions (revisited)
   Due to the inclement weather, several folks joined a tad late. We reintroduced ourselves and shared stories of most interesting items we ever requested and received through ILL.

   Dawne Tortorella introduced Holly Szpara, Saint Charles Public Library District, as our ILL Users Group Co-Chair. We are anxious to move our User meetings to be member-led and Holly's experience and enthusiasm is appreciated. Holly will work closely with Dawne and Helen Pinder in setting agendas, leading discussion/activities, and encouraging member engagement.

3. ILLINET Traffic Survey BLUEcloud Analytics (updated for FY 2019)
   SWAN Reports > IPLAR > ILLINET Traffic Survey > FY2019 > ILLs Sent & Received (FY2019)
   http://na1-microstrategy.bc.sirsidynix.net/bcanalytics/asp/Main.aspx?evt=3140&src=Main.aspx.3140&documentID=EAFBAF1111E94B55B8D70080EF35DECF&Server=BCA-Microstrat2-

1&Project=BCA%20SWANLIBS&Port=0&share=1
FY2016 – 2019 available

ILLINET Traffic Survey reports are available for FY19. The deadline for submission is end of March, but libraries can enter this FY19 data at any point. Information on the process and access to the survey for data entry is available for the State Library - https://www.cyberdriveillinois.com/departments/library/libraries/ill_survey.html

To make this process easier, SWAN will be sending out these reports in PDF since many responsible for entering this survey information may not be using BLUEcloud Analytics.

4. OHM – OCLC Holdings Manager – an update on updating OCLC holdings
Dawne provided an update on work underway to continue monthly (~10x a year currently) updating of OCLC holdings. Setting these holdings in OCLC consists of adds (set holdings) and deletes (unset holdings) which reflect whether a library (determined by OCLC symbol) owns the title. SWAN is leading efforts and working with our consortia colleagues in automating this process. For many years, this process has been managed by The MARC of Quality through their OSMOSIS program. For additional information on this project and the work of the RAILS Consortia Committee – Exposing Consortial Holdings Working Group, see the RAILS website - https://www.railslibraries.info/board/consortial-holdings. The Working Group's final report will be available for the next meeting, October 21.

5. Training & Support – what do members need?
We reviewed the available resources online, including new webinar recordings:

- OCLC WorldShare ILL – Setting Up Groups & Deflection
  https://support.swanlibraries.net/tutorial/66838

- Resource Sharing Overview for SWAN Libraries
  https://support.swanlibraries.net/tutorial/66828

The following topics were identified for future training, documentation, and group discussion:

- Article Exchange

- Item-level Deflection

- OCLC Policies (setting, searching, reviewing, reference use)

- Creating Brief Records (and process of when to remove)

- Shared Practices Documentation

- "Shared" Group Lists
  - Delinquent
  - Standalone Libraries
  - A/V Lenders

- Semantics Glossary (e.g. Due dates, renewals)

- Open Access Resources -> how to identify in OCLC

- Staff Access and Account Creation in OCLC WorldShare

- Interlibrary Loan Fee Management (IFM) – setup and use

- Going Paperless on OCLC

- Review of Holdings Accuracy

- Book Club Group

- Cheat-sheet/Short guide on key tasks (what to do when the ILL expert is out of the office)

- What is/is not automated in the ILL workflow

- Guest Speakers – targeted invitation from experts who may not participate in these meetings but closely interact with ILL processes

We will use this list to help identify future webinars, documentation, and to provide opportunities for discussion and shared practice in upcoming meeting.

6. Network & Sharing
We broke into groups to share typical work processes in our own libraries. The following questions were used to guide discussion:

- How are activities/responsibilities shared or split between staff in ILL and Circulation? For example, are there different responsibilities based on where the ILL transaction occurs (within SWAN, outside of SWAN)?

  Generally, libraries share ILL responsibilities between Circulation (within SWAN ILL) and ILL (outside of SWAN requests). A typical patron request begins with a reference interview.

- When, who, and how often do you process the OnShelf Items (Pull List)?

  Typically libraries are checking the OnShelf Items lists between 2-3 times per day. Some check for their patrons more often throughout the day and pull those items.

- When does delivery arrive at your library?

  Of note was the difference in delivery time between libraries serviced by RAILS delivery directly (Bolingbrook hub) versus CTL (contracted delivery service for 78 SWAN libraries). Libraries serviced from the Bolingbrook delivery hub receive deliveries early morning or mid-day. Libraries serviced through CTL receive their deliveries overnight, with processing of those bins often happening before the library opens. This difference in delivery time impacts how staff process the bins.

- What is the average number of bins incoming/outgoing? And, typical peak day/number?

  The range of typical volume is from 1 bin to 15.

- Do you use the SWAN In Transit label generator? Or another label generation option?

  Some of the libraries use the SWAN In Transit label generator

- Do you clear the hold shelf/process OnShelf Items on Saturday? Sunday?

  All public libraries clear the hold shelf 7 days a week. Academics 5 days/wk.

- Do you allow patrons to initiate requests through WorldCat Discovery and then ILL staff mediate/review? What other options do patrons use to request items not in SWAN?

  Few libraries allow patrons to make requests directly through WorldCat Discovery. St. Charles, Bloomingdale, Thomas Ford do.

- Do you request items from non-SWAN, non-OCLC libraries? If so, what is the process? And which libraries do you have strong sharing partnerships with?

  All libraries use OCLC WorldShare ILL for requesting items outside of SWAN. Naperville was named as a strong partner in sharing and they are not an OCLC member. Some rely on consortial catalog (Share Illinois) access to place holds directly in those catalogs. A few libraries mentioned they use i-Share for items held by universities.

  Some libraries will use OCLC to place requests for Book Club titles if copies are limited in SWAN

7. Agenda Building and Network for next meeting

   Of note is the desire to develop a session, and potentially an ongoing group to meet regularly, that would focus on Book Clubs/Discussion Groups. This is a topic where ILL, circulation, public service, and cataloging/tech services all interact. Sharing best practice and tips is desired. Holly and Dawne will reach out to members we know have an interest in this area and will target an initial meeting before the end of the year.

Next Meeting: To be determined based on SWAN 2020 meeting schedule.