



SWAN ILL Users Notes

Tuesday, February 11, 2020, 9:30 AM – 12:00 PM
RAILS – Burr Ridge

Facilitators:

1. Holly Szpara, co-chair, St. Charles Public Library District
2. Helen Pinder, co-chair, Resource Sharing Consultant, SWAN

Agenda/Notes:

- I. Welcome and introductions

Helen welcomed the group and re-introduced herself and Holly Szpara as co-chairs of ILL Users.

- II. Find More Illinois, Update & Demonstration – Jessica Nawrocki, Frankfort Public Library District

Jessica shared their work with Find More Illinois and how this has supplemented their ability to target in-state requests for material. A major advantage of using Find More Illinois (FMI) is that patrons can make requests directly for mediation by staff. Limits in number of requests allowed per patron are honored by the system which self-gates additional requests. Patrons are able to track their own requests and know if an item can be filled or not through the system. Once the patron logs in through Open Athens authentication, their information is stored in the request. Patrons also receive automatic notification of request updates through FMI and these notices are customizable.

Frankfort Public Library District is using Find More Illinois as the source for requesting in-state items. Currently about 20% of their ILL requests outside of SWAN are processed through FMI. As more libraries join FMI, they hope this grows.

Setting up the system was not difficult given the support provided by Eric Bain, RAILS. More information on Find More Illinois is available on the website: <https://www.findmoreillinois.org/> which includes a list of participating libraries, information on how to join, and searching the

catalog. Cost to participate is based on collection budget and is available online - <https://www.findmoreillinois.org/join/fees>.

While you can search the system without logging in, requests can only be made by participating libraries. To search the Find More Illinois catalog, go to:

<https://rail.agshareit.com/home?cid=rail&lid=rail>

The library dashboard provides statistics, as well as borrowing and lending queues for processing. Items that are put in transit to another Illinois library have transit labels generated which make the process easy in terms of preparing items for delivery. Once an item is requested from another library, either via patron-initiated or staff-initiated request, the workflow process of entering the item into the SWAN catalog, placing a hold, and checking the item out to the patron is the same as with WorldShare ILL.

The system is very customizable and there is not a set loan policy used by participating libraries. Each library defines their own lending rules.

Currently, Frankfort is the only SWAN library participating in FMI. They have been using the system since October. Only Frankfort items can be requested through FMI. And there is no way to restrict patrons from requesting titles/items through FMI that could be provided through SWAN interlibrary loan. There is a component of patron education involved so that patrons understand the best paths for requesting titles. There are marketing materials available from the website, including bookmarks and training material.

III. Using Interlibrary loan Fee Management (IFM) to facilitate out-of-state and special request processing – Holly Szpara, St. Charles Public Library District

Holly shared how St. Charles uses OCLC IFM. IFM allows libraries to transfer money back and forth. It does not involve your accounting department or board – there is no need to write checks. It works as debit/credit between libraries sharing material. If your library has a credit at the end of the fiscal year, Illinois Heartland Library System (OCLC statewide contract agency) will issue a check.

To use IFM, you need to make sure that your Policies in OCLC are set up to allow IFM. In the Policies Directory:

- Define which resource sharing groups you belong to (e.g. LVIS, AMIGOS)
- Make sure your policies do not deflect out-of-state requests
- Determine if you will provide loans and/or copies (e.g. St. Charles provides copies at no charge for any requests)
- If In-State, do not charge for lending
- Libraries that charge – St. Charles charges what they would charge and only use IFM (again, IFM requests can be enforced through deflection rules – only accept payment via IFM)
- In Service Configuration, update your Constant Data to insert a rate (e.g. OUTOFSTATE).

Holly wanted to have funds coming in so that their own patrons could borrow material out-of-state without cost. St. Charles uses their IFM revenue to fund requests out-of-state for their patrons. Having a pool of money from IFM gives them the flexibility to request material for their patrons that previously required the patron to agree to pay the cost to get the item. Their use of IFM allows them to provide better customer service with less staff time involved.

SWAN does not handle IFM money. You get an invoice each month from Illinois Heartland Library System which reflects the 25-cent transaction cost per IFM transfer. This invoice provides no detail, but the detail of all IFM transactions is available through your OCLC ILL statistics. OCLC statistics track the debits/credits through IFM. Reports show monthly borrowing/lending reports and IFM transactions. For example, last month, St. Charles had \$171 in requests from other libraries. Generally, they see many requests coming from academic institutions and New York Public Library. Since St. Charles has a policy to charge the same as a requesting library, there is a wide range in transaction charges. Some libraries (e.g. Arlington Heights) charge a flat rate for any lending request. Some libraries may find this easier to implement.

When processing requests coming in from out-of-state, constant data record applies a fee which can be adjusted based on reciprocity of charges. You also need to check the use ILL Fee Management checkbox for payment method and review/adjust the charge. St. Charles considers libraries that use IFM another potential pool of lending libraries which reciprocally share for a fee. This has enlarged their group of lending partners and enabled them to collect fees to supplement their own requests. Last year St. Charles had a surplus (credit) of ~\$600 at the end of the year.

Billing for lost materials can also be accommodated through IFM. If you lose/damage something, you can create a fake request indicating IFM payment for the cost of the item. These eliminate the back and forth with billing between libraries and enables ILL staff to communicate and resolve issues directly with ILL peers in other institutions.

When getting started, the most difficult aspect is building out your Policies Directory. SWAN will help with this.

St. Charles has never had a negative balance, but if libraries are worried about being charged, you can mediate your requests to make sure you are not over-extended (e.g. only requests from libraries in-state or that do not charge). Custom lending paths can be used to select free lenders first, but if none are available, the request can be extended with a wider group of potential lenders.

All requests come through the ILL department for mediation. At St. Charles, reference librarians submit requests without a lender string; ILL staff then review the request and choose lenders.

IV. Coordination of Library Closings and impact on ILL

Dawne Tortorella, SWAN, shared some library closures that are upcoming which will impact lending within SWAN. St. Charles Public Library District is moving in March to a temporary location of former Haines Middle School, while their building is under renovation for approximately 15 months. Geneva Public Library District is moving to their new library later this spring.

SWAN is working with both libraries on their closures and availability of items within the consortium. Look for swancom announcements regarding availability. If your library will have a closure which impacts resource sharing within SWAN, please open a SWAN support ticket and we will coordinate policies and communication with you.

V. Discussion on mediation of lost/damaged items – workflow exercise

Participants broke into 5 groups to discuss internal workflow on how they mediate lost/damaged items outside of SWAN. All groups indicated that they loan more material outside of SWAN than they request.

Generally staff find it is easier to mediate lost/damaged items outside of SWAN, but recognize this could be due to several factors, including patron behavior and acknowledgement that patrons requesting through external ILL generally know that it is a value added service and recognize that the material was requested specifically for them. Also, volume of requests outside of SWAN is a small fraction of those interlibrary loan transactions between SWAN libraries.

There was almost an even split between libraries having a separate ILL department and those with combined Circ/ILL.

VI. Next Meeting

Wednesday, June 3, 2020, 9:30 AM – 12:00 PM (RAILS – Burr Ridge) – Register on L2
[\[https://www.librarylearning.info/events/?eventID=30272\]](https://www.librarylearning.info/events/?eventID=30272)

Attendees:

1. Sandra Leyva (Alsip-Merrionette Park Public Library District)
2. Mary (Mimi) Johnsen (Bloomington Public Library)
3. Jeri Cain (Carol Stream Public Library)
4. Jessica Nawrocki (Frankfort Public Library District)
5. Kryztal Gonzalez (Franklin Park Public Library District)
6. Susan Krass (Geneva Public Library District)
7. Karin Gerson (Homewood Public Library District)
8. Patricia Czuba (Indian Prairie Public Library District)
9. Jane Ruback (LaGrange Public Library)

10. Morgan Burns (Messenger Public Library of North Aurora)
11. Mary Malach (Messenger Public Library of North Aurora)
12. Mary Osorio (Messenger Public Library of North Aurora)
13. Deborah Walsh (National University of Health Sciences)
14. Meghan Moran (Oak Lawn Public Library)
15. Alex Altan (Prairie State College)
16. Mary Gaffney (Saint Charles Public Library District)
17. Vickie McFarland (Saint Charles Public Library District)
18. Holly Szpara (Saint Charles Public Library District)
19. Toni Jacobs (South Holland Public Library)
20. Helen Pinder (System Wide Automated Network)
21. Vickie Totton (System Wide Automated Network)
22. Sandra Frank (Thomas Ford Memorial Library)
23. Marcy Biala (Westmont Public Library)
24. Lisa Jones (Woodridge Public Library)
25. Julie Lombardo (Woodridge Public Library)

SWAN staff in attendance:

1. Dawne Tortorella (SWAN)
2. Vickie Totton (SWAN)
3. Helen Pinder (SWAN)