Resource Sharing Marmot Style

Suggested Workflow for User Initiated Holds

Barbara Brattin
Chair, Marmot Resource Sharing Committee
Wilkinson Public Library, Telluride
WHY DO IT?
Self-service everywhere

There is an increasing desire for individuals to be able to just handle it themselves.

- ATM machines
- Travelocity, Expedia
- Self-pay gas pumps
- E*Trade
- Netflix
- Online banking
Chester County Public Library System

• Multi-type consortium in PA
• 20 member libraries
• Began user initiated holds three years ago
• First month, no advertising- 2,000 holds placed
• Three years later= 22,000 holds placed per month.

WOW!
Your Users Expect This Service

- Anyone under 25 doesn’t want to ask
- Google= the whole world is available
- If they’ve lived somewhere else, chances are good they’ve been placing their own holds.
- If you won’t provide it quickly and without any barriers, they will find someone who will.
Library Users Like Self Service

Libraries like Dr. Martin Luther King Jr. Library and the West Bloomfield Township library have achieved 90% self-checkout levels.

WHY DO WE THINK THEY WON’T WANT TO PLACE THEIR OWN HOLDS?
Innovative Knows This

• The Innovative Interfaces Product is full of features that allow users to serve themselves
• ILS vendors compete with each other to come up with new ways to allow patron self-sufficiency
• User initiated holds is a concept that’s been around for more than 10 years.
Self-service: Placing Holds
Self-service: Freezing Holds

The user maintains his place in line until he unfreezes the hold and then if the material is available it will be paged.
Self-service:

Ecommerce product
Self-service:
Online Patron Registration Product

Patron Self Registration

Welcome!
This page allows you to register on-line as a patron of our library.
You will have limited privileges.

Name
First:             Middle:             Last:

Street Address:                                            

City, State, ZIP Code:                                      

Phone number:                                               

Birthdate:  (mmddyy)                                        

Email address:
Library staffing challenges

- Growing number of services offered
- Shifts to new duties
- Dramatic use of traditional ILL

All these factors combine to make patron empowerment helpful, especially when patrons see it as a feature!
They Know It’s Out There

• We can do ILL the traditional way

   OR

• We can do ILL the smart way- less time, less paperwork, less money
ASSessing ILL/DD Services: New Cost Effective Alternatives
A Study by Mary Jackson from ARL

User-initiated interlibrary loan (ILL) and document delivery (DD) operations provide better service than mediated ILL/DD services. In most cases, user-initiated services have lower unit costs, higher fill rates, and faster turnaround times than mediated services. These are some of the major findings of a two-year study of ILL/DD services in 72 North American research, college, and governmental libraries conducted by Mary E. Jackson of the Association of Research Libraries (ARL). The findings are reported in Assessing ILL/DD Services: New Cost-Effective Alternatives, forthcoming from ARL publications.

<table>
<thead>
<tr>
<th></th>
<th>Five User-Initiated ILL/DD Services*</th>
<th>Mediated ILL/DD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing Unit Cost</td>
<td>$2.39-$14.70</td>
<td>$17.50</td>
</tr>
<tr>
<td>Lending Unit Cost</td>
<td>$3.27-$12.06</td>
<td>$9.27</td>
</tr>
<tr>
<td>Combined Unit Cost</td>
<td>$6.16-$26.76</td>
<td>$26.77</td>
</tr>
<tr>
<td>Borrowing Fill Rate</td>
<td>84%-90%</td>
<td>86%</td>
</tr>
<tr>
<td>Lending Fill Rate</td>
<td>82%-87%</td>
<td>58%</td>
</tr>
<tr>
<td>Borrowing Turnaround Time</td>
<td>2.5-6.6 calendar days</td>
<td>7.6 calendar days</td>
</tr>
<tr>
<td>Lending Turnaround Time</td>
<td>0.1-1.5 calendar days</td>
<td>1.5 calendar days</td>
</tr>
<tr>
<td>Borrowing Transactions</td>
<td>5,790-37,327</td>
<td>16,698</td>
</tr>
</tbody>
</table>
Staff Workflow

A patron in another Marmot library has placed a hold on an item in your library.

NOW WHAT?
DAILY ROUTINE

PAGING SLIPS

• List items requested from your library
• Print every morning or more often as needed
• Take list to shelf
• Collect items
  – Items will be listed with title and call number. (see handout)
Check Items In

- Scan each item on your list using the “check in” function

- Screen will read either…
  - “ON HOLD” for patron at your library
  - “IN TRANSIT” to another library
Mark Items

• In-house hold-
  – Mark as you would any in-house hold and place on hold shelf. Notify the patron.

• In-transit hold-
  – Place a courier slip in the book, then place the item in the courier delivery bin.
What if you didn’t find an item listed on the paging slip?

• If you don’t find an item on your paging slip, simply skip the item.

• The item will show up on another library’s paging slip the next morning.
Receiving Items

Daily courier delivery will bring:
1. Items from other libraries requested by your patrons
2. Items returning home to your shelves
3. ILL items from outside Marmot
Check Them In

• Scan items under “check in” function
• The screen will instruct you on how to handle the item:
  – Return to your shelf
  – Place on hold shelf for your patron
  – Continue to route to another library
HOLDS REPORTS

TO CATCH THE EXCEPTIONS
HOLDS REPORTS

- Expired Holds
- Clear Hold Shelf
- Outstanding holds
- Hold cancellation notices
Hold Cancellation Notices

• Patron cancels hold
• Staff cancels hold
• Hold is unfulfilled by all owning libraries
• Expired Holds Report is run daily, generates notices
• Notices can be printed or emailed
Clear Holds Shelf

• What’s expired that’s sitting on your shelf?
• What has the patron never picked up?
• Check item in, it will redirect the item to where it belongs.
View Outstanding Holds Report

Shows what copies are unfulfilled by available copies

AKA: Why is that book still sitting in the stacks when there’s a hold on it?
View Outstanding Holds Report

- Select to show only your library
- Select to show unfilled holds for last week only
FAQ’s

Q: Whose book will be selected to fill a hold?

A: The patron chooses a pickup location. In the interest of efficiency, the system chooses that location to fill the hold first if its copy is available.
Q: If there are many books throughout the system to fill a hold, which book is selected?

A: First, the system looks to the library which has been selected by the patron as the pickup location. If the book is checked out, the system randomly chooses
Will my AV collection get wiped out?

- Each library should monitor use of their collection. If you feel like your patrons are being short-changed by other libraries’ requests, you can limit what you share by item type or date you catalogued it.
Special Thanks

- Susan Saul, Minuteman Library Network
- Chester County Library System
It's QUESTION TIME!!
Marmot Resource Sharing Committee

Barb Brattin, Wilkinson Public Library- bbrattin@telluridelibrary.org
Beth Avery, Western State College- bavery@western.edu
Terry Pickens, Mesa County Public Library- tpickens@mcpld.org
Jaci Spuhler, Eagle County Public Library- jspuhler@marmot.org
Cappi Castro, Grand Junction High School- cappi@mesa.k12.co.us