Resource Sharing Marmot Style

Suggested Workflow for User Initiated Holds

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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.
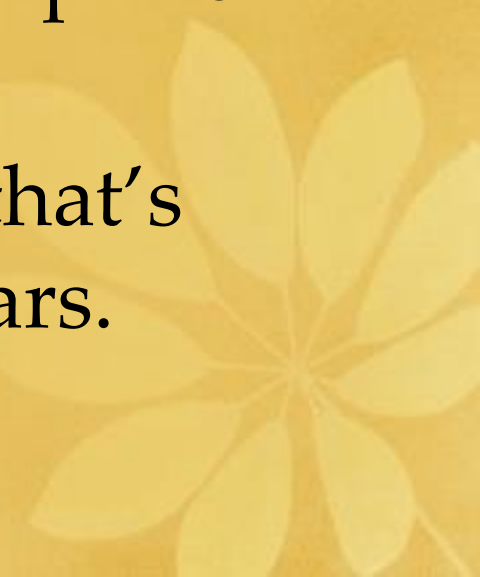
WHY DO WE THINK THEY WON'T WANT TO PLACE THEIR OWN HOLDS?

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: Modifying Holds

Self-service: Freezing Holds

CANCEL	TITLE	STATUS	PICKUP LOCATION	CANCEL IF NOT FILLED BY	FREEZE
☐	**In the night kitchen / Maurice Sendak.**	1 of 1 holds *This material may be immediately available*	Marigold ▼	05-17-05	☑

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

My Record

Modify Personal Info

3 requests (holds)
1 Inte
1 Iter

Show M

Pay Online

FINES

Sanders, Dinah
5850 Shellmound Way
Emeryville, CA 94608

Search Catalog

Preferred Searches

My Reading History
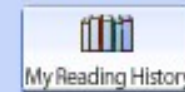
Clear All   Select All

Fines/Fees:

☑ Eats at desk: crumb fee $0.10
☑ late fee $0.10
☑ early fee $0.10
☑ DAMAGED VIDEO $20.00
☑ REQUEST 09-29-04
05:07PM: Pancakes, $3.00
pancakes! / Eric Carle.
☑ American Libraries $3.00
☑ A pattern language :
towns, buildings, $3.00
construction / Christopher
Alexander, Sara

TOTAL FINES $29.30

TOTAL $29.30

Recalculate Total

Billing Information:

Name: Sanders, Dinah

Address: [   ]

City: [   ]

State: [   ]

Zip Code: [   ]

Email: dsanders@iii.com

Credit Card Information:

Card number: [   ]

Expiration: [   ] / [   ]

Security Code: [   ]

Submit   Cancel

Self-service:
Online Patron Registration Product

INNOVATIVE. interfaces

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!
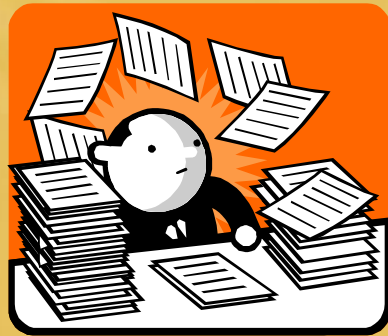
They Know It's Out There

- We can do ILL the traditional way

    OR

- We can do ILL the smart way- less time, less paperwork, less money

| Edit | View | Favorites | Tools | Help | Links | Marmot Library Network, Home Page | Google | Colorado Association of Libraries | Colorado State Library |

http://www.arl.org/stats/newmeas/ill_flyer.html

ASSESSING ILL/DD SERVICES: NEW COST EFFECTIVE ALTERNATIVES
A STUDY BY MARY JACKSON FROM ARL

About the Program

ARL Statistics

Annual Salary Survey

Survey Information

New Measures Initiatives

Workshops

ARL Home

Statistics & Measurement Home

ther Links:

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.

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

Internet

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

  or

 "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.
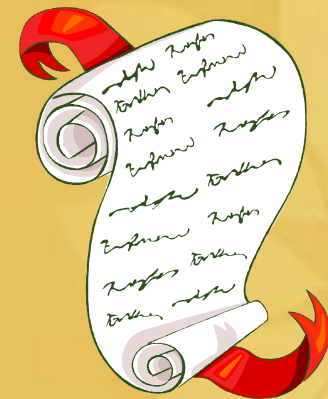
Receiving Items

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.

FAQ's

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.
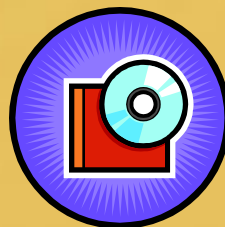
Special Thanks

- Susan Saul, Minuteman Library Network
- Chester County Library System

THANK YOU

It's QUESTION TIME !!

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