

MERLIN ILL Committee Meeting, May 15, 1998
Held at Library Systems Office, UM-Columbia
Chaired by Mary Ann Samson
Minutes taken by David Shocklee

Attendees:

Mary Ann Samson, SLU Law
Janet Jackson, LSO
Robin Kespahl, UMC
Mike Corlee, UMC
June DeWeese, UMC
Marilyn Voegelé, UMC
Alice Edwards, UMC HSC
Georgia Hall, UMR
Minnie Breuer, UMR
Janet McKinney, UMKC Law
Nancy Radonovich, UMKC
Linda Ritter, UMKC
Elizabeth Ader, UMKC
Mary Zettwoch, UMSL
David Shocklee, SLU Pius
Doris Beeson, SLU Pius
Mary Ann McFarland, SLU HSC
George Rickerson, LSO
Gary Harris, LSO
Needra Jackson, UMC Law

The meeting began about 10 a.m.

The opening discussion concerned the ILL Best Practices meeting of April 23.

MaryAnn Samson read the main advantages and disadvantages of the Colorado State University model to the group. June DeWeese mentioned the concern of duplication of local holdings in ILL requests. George Rickerson suggested that III be used to check local holdings. George cited the importance of having the III representative at the Best Practices meeting, that III was committed to improving it's ILL Module.

The discussion then focused on the III ILL Module. George passed around a news release from III about a mid-year release of enhancements to the ILL Module which will follow Release 12 of the Module. The first listed enhancement drew the most attention: "improvements to the OCLC interface which will improve throughout, make it possible to have requests go directly to OCLC without having to make stops first, but which will also feature flexibility in that requests will be able to be directed to multiple targets." Mary Ann McFarland asked if there were any plans for III to interface with Docline, which is what the medical libraries would like to see. June proposed routing a potential ILL request through MERLIN which would generate a paging slip if owned locally. George thought this was a good proposal, and easier to do within a MERLIN environment. June commented that there would be no reason to do G-function if this could be done. George said he would ask III if ILL Direct requests from patrons

could be directed to multiple targets which would include Docline.

George spoke next about his proposed visit to III this summer with Paul Buchanan of the Washington University ILL Best Practices Team, and Ted Sheldon, Director of Miller Nichols Library at UMKC. He felt that this visit could yield a good sense of III's commitment to the consortium's ILL needs and if the ILL Module could be made satisfactory. Mary Zettwoch commented that the automated E-mail notification of patrons (as cited in the CSU model could increase efficiency more than any other function. June also suggested George should talk to III about this E-mail possibility because of the savings in staff time and paper. George said the maintenance of patron files for E-mail addresses could be done, but patron records and E-mail are institution specific problems, such as at UMC. It is a two-pronged problem, one for III, one for us. Gary Harris commented that you either have to do E-mail or do paper, you can't do both or divide it.

MaryAnn Samson suggested we use what we can of the CSU model, but we have to decide on whether or not to adopt the III ILL Module. George said the Directors had committed to the Best Practices Project and asked, if not the III ILL Module, then what? June asked if we should use the ILL Module for the patron electronic request feature and not use the rest of the ILL Module. Robin Kespahl spoke about how one ILL staff could be in each type of file (a total of 5 files), and, therefore, only one ILL staff could be working in the Request File as of Release 11. George commented that we could do more with the III ILL Module than CSU can do with their ZAP system's non-integration with local holdings. The ILL Module cannot do that yet, but they could improve it.

Elizabeth Ader asked what would be minimally acceptable for the ILL Module. She felt the direction for improvement should come from this group. Included should be seamless integration with MERLIN for local holdings and automated E-mail notification. June said only one ILL staff at a time in the Request File was not acceptable as a Best Practice. Mike Corlee mentioned that Colorado State U. took years of revising to get to the point they were at with their system. I suggested that we should learn from their groundwork and not be guinea pigs if we didn't have to be. June thought we should have leverage for the improvements we need. Mary Zettwoch said Shirley Baker (Director of Olin Library, Washington University) saw CSU as a perfect model to adopt in 6 months, but that we may not want to adopt that timetable since we want what we like about the CSU model but want improvements over what they do. June added that CSU looks at different batches of requests (one ILL staff person works on requests 1-40, another on 41-80, etc.). That feature would solve the "only one person in the Request File at a time" problem with the ILL Module, if III would adopt it.

Robin then brought up the point that ILL Direct goes to the OCLC Review File first and staff have to send the request on to OCLC. MaryAnn Samson said she would call Traci Byerly at MLNC for information about OCLC ILL Direct. June asked that item one of the Release 12 enhancements be clarified when George spoke to III. Janet McKinney said she would like to see statistical enhancement flexibility emphasized because law libraries have to generate annual statistics reports for different consortia,

including types of materials lent. Gary brought up the question again, "If we turn on the ILL Module, does that mean we all have to use it?" Robin added that there is considerable profiling to be done before you can turn on the ILL Module. MaryAnn Samson asked if we were saying we could work with the III ILL Module? Janet responded, "But not at this time." "But if they met our needed improvements with Release 12.5?" MaryAnn asked? The group members nodded their assent.

The meeting then moved on to the last two items on the agenda: the tabulation of statistics from the patron-initiated and interlibrary loan turnaround time studies. It was agreed to track the number of days between elements (0 for same day, 1 for next day, etc.), with total statistics by library and category, showing the average number of days between elements for all transactions supplied by the individual libraries. Across the top of the spreadsheet would be the categories, along the side would be the libraries. For the patron-initiated requests, the first column would be the average number of days between the day the paging slip was printed and the day the book was pulled from the shelf, then day pulled and day sent out, then day sent out and day received. For interlibrary loan requests, the first column would be the average number of days between the day the patron handed in the request to the day the request was submitted by ILL staff, then the day the lending library looked at the request to the day the material was sent out, then the day sent out to the day received by the borrowing library. The total average turnaround time for transactions with the individual libraries would be tabulated, then total number of requests, then total not picked up by the patron. It was agreed the books or articles not picked up by the patron would not be figured into the average turnaround time. It was also agreed not to count as an element the day received to the day the material was picked up by the patron since, for the patron-initiated study, the day picked up was not recorded on too many requests while all the other elements were recorded, and, for interlibrary loan, material sent by interoffice or other mail to a patron was counted as patron picked up. The tabulation of the statistics would be done by the departments responsible and put in spreadsheet format by the ILL staff. The results are due to MaryAnn Samson by August 1st.

June then mentioned a problem with patron-initiated requests: that patrons think these requests will generate patron recalls, but they do not. The patron has to come in to the library to do a recall request.

Nancy Radonovich asked if there was a policy in place for when students from the other Missouri campuses want ILL service at your library. She had given ILL service to a student from one of the other Missouri campuses who was from Kansas City, but felt she had no leverage for getting borrowed materials back if the student did not want to return them. Mary Zettwoch said she had given ILL service to other Missouri campus students in the past but did not know of any written policy. It was decided to look into the matter and put it on the agenda for the next meeting. MaryAnn said she would set up a tentative meeting date for some time in July just to secure a time. If there were not sufficient agenda items to discuss, we could always cancel.

The meeting adjourned at 1:40 p.m.

