Outreach and customer service for interlibrary loan

MEGAN GAFFNEY, PEGGY GLATTHAAR, AND MEG MASSEY
• Outreach and customer service, July 8
• Using ILL statistics for decision-making, July 28
• Making ILL materials accessible: Examining the law, current practices, and the future, August 13
• OCLC/Atlas update, September 2
• May the source be with you: VIVA whole e-book lending, September 22
Today’s presenters

Meg Massey
Manager of Interlibrary Loan
The Pennsylvania State University

Megan Gaffney
Coordinator, ILL & DDS
University of Delaware

Peggy Glatthaar
Head of Customer Services
Florida Gulf Coast University
Agenda

• Introduction
• Our challenges
• Intros and what we’ve done at our institutions
• Working with other libraries
• Q&A
ME TRYING TO EXPLAIN

INTERLIBRARY LOAN
Challenges

- Customer expectations in a changing environment
- Communication
- Finding what’s meaningful/useful to our users
- Geographic limitations
- Staffing and budget issues/limitations
- Training issues
- Demonstrating our value
Megan Gaffney
Coordinator, ILL & DDS
University of Delaware Library
University of Delaware

Main campus in Newark, DE
Other locations: Lewes, Georgetown and Wilmington, DE; online programs

Enrollment:
• 24,120 undergraduate
• 839 Associate in Arts undergraduates
• 4,164 graduate students

Faculty/staff:
• 1,334 full-time faculty
• 4,624 total employees

ILL numbers for FY 18-19:
• Borrowing: 14,571
• Lending: 38,472
• Document delivery: 2,011 (articles and loans)

Image credit: udel.edu
We made a video!

https://library.udel.edu/interlibraryloan/?jwsource=cl
Assessing services to serve users

https://flic.kr/p/3qePKG
Assessment into action

• Change your assumptions
  • You know users love you. What do they value most?

• Change your workflow

• Change your policies

• Make a case to administrators for increased support
Coordinate with colleagues
Create reasonable expectations

**Electronically Received Articles**

<table>
<thead>
<tr>
<th>Transaction</th>
<th>View</th>
<th>Size</th>
<th>Title</th>
<th>Author</th>
<th>Expires</th>
<th>Delete</th>
</tr>
</thead>
</table>

**FAQ: How do I renew my Interlibrary Loan book?**

**Checked Out Items: Click the Transaction Number to Renew**

<table>
<thead>
<tr>
<th>Transaction Number</th>
<th>Document Type</th>
<th>Title</th>
<th>Author</th>
<th>Due Date</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
</table>

*Not Wanted After Date *(MM/DD/YYYY)*

Will you accept an alternate edition of this item? Yes

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**RSC20 WEB SERIES**

**MOVING FORWARD TOGETHER**
Goals for 2020

• Continue work on central FAQ group
  • Common vocabulary
  • Common patron experience

• Standardize customer service
  • Compile internal FAQ
  • Ensure all staff and students know the basics
  • Customer service webinars/classes
Services during COVID-19

• Working off-site since March 14
• Borrowing e-books and e-articles as much as possible; using National Emergency Library, HathiTrust ETAS, and normal suite of open access tools to fill requests – 81% fill rate in our first month!
• Reviewing our e-resource licenses to maximize lending
• Communicating what we can and can’t do during this time – and how to return borrowed items
• Planning for a phased return to the building, including a pickup service and a potential for increased virtual services going forward
• Contributing to larger conversations and initiatives, including the IFLA RSCVD project
Peggy Glatthaar
Head of Customer Services
Florida Gulf Coast University Library
Florida Gulf Coast University

Fort Myers, Florida (we just turned 21!)

Enrollment:

• 14,024 undergraduate students (40% first generation)
• 1,056 graduate students

Faculty/staff: 1,401

ILL numbers for FY 18-19:
Borrowing: 2,248
Lending: 4,426
Document delivery: 1,328

Image credit: fgcu.edu
Meet our fun Customer Service Staff
Challenges for FGCU: How customer services can provide ILL

• How to introduce students to ILL services
• How to make access easy/convenient to students
• How to train staff & student assistants to spread the word/all send the same info
• How to communicate our services to our students
Library Express Delivery & ILL

- First university in Florida to “pilot” library delivery to residence halls.
- New service provided opportunity to do outreach where the students live.
- Introduce to our students that they have access to libraries around the world.
- Train our staff/student assistants to demo how to get what they need - provide excellent customer service.
1, 2, 3…

https://drive.google.com/file/d/1p0gW0AffYRm95ZXKU8pa4k9mmx4GUoBC/view
How we market ILL services

- Student Government Instagram
- Library Instagram
- Network with campus organizations
- Table events at the main pick/drop off bus location at the residence halls
- Flyers on tabletops in the Library
- Librarians in teaching sessions talk ILL
- Word of mouth at the Circulation Desk
Result of customer service/outreach focus: Students learn about ILL

- New delivery service provided an outreach opportunity
- New convenience
- Access to information
- Saves students money
- Most importantly to connect with our students to more library services
Customer services during COVID-19

- Encourage staff to attend webinars
- Curbside pick-up
- Scanning chapters from textbooks
- Extending due dates
- Staff cross training
- Preparing to be hybrid and/or virtual for Fall Semester
- Purchasing new scanner for CDL
- Staffing our Circulation Desk safely
- Utilizing social media more than ever before
Video for curbside pickup

https://www.instagram.com/p/CBveFdfAqY3/?igshid=1prhq1kiraiu
Meg Massey
Manager of Interlibrary Loan
The Pennsylvania State University Libraries
The Pennsylvania State University

University Park, PA
Locations: 24 campuses & World Campus
Enrollment: 96,408
• 81,080 undergraduate students
• 15,328 graduate students
Faculty/staff: 31,027 full-time employees

ILL numbers for FY 18-19:
• Borrowing: 48,693 filled
• Lending: 61,691 filled
• Document delivery: 13,646 filled
• Office delivery: 7,671 items shipped
• World Campus: 1,308 items shipped

Image credit: psu.edu
Challenges at PSU

- What’s meaningful to our users?
- Geographic limitations
  - Our proximity to patrons
  - Distance users
  - Multiple campuses/branches
- Inconsistent messages
Surveys

• Utilizing surveys to solicit feedback
  – We use Qualtrics to create surveys
    • Upload contact lists to share them
    • Send reminders
    • View reports

• Various audiences
  – Staff
  – Graduate students using Office Delivery
  – General survey for ILL users

Below you will find a short survey with a few questions about our Office Delivery service. We would appreciate you taking a few minutes to fill this out and send us your feedback. Thank you for using the service!

Meg Massey, on behalf of the Interlibrary Loan Team at Penn State University Libraries

How satisfied are you with the Office Delivery service?

- Extremely dissatisfied
- Somewhat dissatisfied
- Neither satisfied nor dissatisfied
- Somewhat satisfied
- Extremely satisfied
Updating web pages

- Added pages for delivery services including Office Delivery and World Campus
- Added a new FAQ page
Updating LibApps FAQ

- Updating existing LibApps FAQ entries
- Adding new entries as we receive feedback from public services staff and users
Use chat to connect with patrons

- Since 2014, ILL has operated a chat widget
- Users can connect with us Monday - Friday, 8 am - 5 pm
- Patrons can also submit tickets to an ILL queue when we are not online
Training opportunities

• Staff survey led to libraries-wide presentation
• Conducted training with Lending Services (circulation) staff
• Presenting about ILL at our Libraries All Staff Conference
A few other things…

• Services marketed through libraries social media accounts
• Email templates changed to include direct links to documents or ILLiad web pages to make processes easier for patrons
• Use web alerts to communicate important messages to users in ILLiad
• Looking at creating video tutorials that our users can access at their leisure
ILL in the time of COVID-19…

• We have been off site, working from home since March 20
• Filling borrowing and lending requests for online materials
• Made adjustments to ILLiad and Policies Directory settings to better serve our patrons and lending libraries
• Updated due dates for borrowing and lending
• Encouraged students to hold on to materials until they return to campus for the fall semester
• Borrowers are really scouring the earth for materials for our patrons
• Lenders have volunteered for the IFLA RSCVD project
• Return to work groups in the library creating re-opening plans
Good service: Not just our patrons

• My users are your users: good customer service should extend beyond my library to yours
• Take a moment to put yourself in your counterpart’s shoes
  – Can you go the extra mile with that request? Can you go that extra mile with a helpful hint?
Responding to requests

- Just say no, and don’t conditionalize too much
- Avoid the mystery: give a “reason for no”
- Be timely: if your “Days to Respond” doesn’t reflect reality, please update!
- Be mindful of service agreements your library has made
Best practices for lending policies

• Can your loan periods be lengthened?
• Think about ALL your policies
  – Can a non-circulating item be scanned?
  – Do you really need to invoice *that* soon?
• Make it easy to contact you…
• But be mindful of contact with other libraries’ users
• Remember: we really are all in this together
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#OCLC_RSC20