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LACUNY Interlibrary Loan Roundtable Meeting Minutes, June 2006

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ILL Roundtable Meeting

June 13, 2006

Attendance: Jay Bernstein (KB), Evelyn Bodden (CC), Dorothea Coiffe (BM), Julie Cunningham (GC), Richard Hickerson (ME), Jeffrey Kroessler (JJ), Gene Laper (LE), Anne Leonard (NYCT), Clementine Lewis (LG), Eric Neubacher (BB), Beth Posner (GC), Evelyn Silverman (QC), Sherry Warman (BC), Pat Young (Central).

The meeting was called to order at 2:30 PM by Clementine.

The minutes of the last meeting were accepted with minor revisions.

Beth Posner volunteered to be the next co-chair of the ILL Roundtable. Beth will replace Nancy Egan who assumed another job at John Jay as Circulation and Access Services Librarian. All members of the ILL Roundtable expressed their gratitude for Nancy's work as Secretary and Co-Chair of the Roundtable from 2004 to 2006.

Jay asked if anyone had received requests in their WorldCat processing queues without enabling the Direct Request feature. No additional members received requests. However, most members agreed that someone in his library may have enabled this feature.

The following policy issues were discussed:

- **Fees** - Some libraries pay all fees, some charge back to patrons. Anne stated that NYCT only does ILL for faculty and charges no fines. BB, GC, BC, CC cover fees; ME charges faculty; QC does not pay fees for students; LG pays borrowing fees for faculty. It was also stated that it is costly in terms of staff time to keep track of payments when they are charged to patrons.
- **Limits**- GC has a limit of 15 active requests for students, unlimited for faculty, but they are changing it to 10 once CLICS is available since they are understaffed (about half of GC's requests were from CUNY in previous years so it is an overall increase in service for their patrons); CC has a limit of 15/week requests for everyone; CT 10; LE has a limit of 5 out of the library and more can be ordered, but have to be used in the library; KB has not had a problem with anyone ordering too much so far so there are no limits; QC has no limit but they just started using ILLIAD for borrowing so they'll see how it goes; LG lends only to faculty and honor students without limits; BMCC has no limits; ME no limit.

The discussion about CLICS included the following:

- Julie said that with CLICS everyone will be allowed to borrow books from other CUNY libraries. Therefore, undergrads will now have the ability to get items from GC as well.
- Julie said that we should encourage our patrons to submit all CUNY loans through CLICS, but each college will decide how far to go in sending ILL requests back to their patrons, especially in the beginning. Hence, in the beginning, we will probably do CLICS and ILL requests for CUNY books.

- Undergrads in some CUNY libraries will have access to CLICS, but not to ILL.
- Lending library policies will apply to CLICS.
- Patrons cannot request items from the Law School or from their home campus (i.e. it is not a paging system), but they can request that items be sent to any other CUNY library.
- It is possible that CUNY Central will put a limit of 15 items on CLICS so that no library is overwhelmed from the start. (Once it is checked out, patrons may be able to place more holds so they can have more than 15 items at once.)
- Julie is working on FAQs and some publicity pieces that she will share with other CUNY libraries. This publicity will show students why CLICS is preferable to ILL.
- Julie and Pat indicated there will be a joint ILL and Circ meeting in July to discuss how CLICS should be managed in all libraries. However, the ILL and Circ staff should meet within their libraries to discuss CLICS.
- CUNY Central is paying for only one location per campus for the LAND delivery service. Since both ILL and Circ will use LAND, each library has to figure out how they will get the items to the right place.
- The LAND contract should start on July 1st, but it is not official yet. They will let us know when CUNY's contract is processed.
- Everyone should update custom holdings to get to CUNY libraries first, LAND libraries second and METRO libraries third.
- Julie will set up a CLICS meeting after ALA to discuss publicity.
- CLICS will start August 1st.
- Circulation fines are not uniform within CUNY. If faculty are not currently fined, they will not be fined through CLICS. This discussion was tabled by the Council of Chief Librarians and will be revisited at a later date. Many librarians believe that by not charging faculty fines while using CLICS, they will encourage them to use the service.
- The patrons requesting books through CLICS will be notified via email by the next day. If the request is not filled by a library, the email will explain that they should try another CUNY library.
- All libraries will need to change their ILL websites and forms to explain CLICS. It may be helpful to have an icon to click that reads: Did you check CLICS for all CUNY copies of this item?
- There may be a way to change WorldCat to allow CUNY library holdings to appear in bold print to help with placing holds on items.
- Graduate students and faculty may use this function the most, but it would be available to everyone.
- Undergrads need items fast so they might not use CLICS as much.
- Jay mentioned that there may be problems with requests for items like textbooks or 2006 fiction. However, if items are Reserved, they will not be eligible for CLICS holds and should prevent problems.
- CLICS will allow delivery anywhere (i.e., if you live closer to one campus and attend another, you can get delivery to any campus you prefer.)

- Libraries need to reexamine how ILL and circ work since both will be doing resource sharing now. It will be a local decision as to which department will get the items and process them. It can be done by either department or it can be shared. Evelyn said QC has hired students who will be trained to work in both departments as needed.
- Pat said there will be some dry runs done in July. Eric said the scheduled dates are July 11th and 17th. Circ will run print jobs and print out the “pick lists” to see how it looks. Julie said the patrons will be able to place a hold for a book at a library that owns the item. If the book is available (i.e., not reserve or reference), there will be a HOLD button to click. However, the patron must first log in to *My Account* in CUNY to place the hold.
- Since patrons have already requested this type of service, CLICS will be helpful to them. Although there will be some confusion regarding whether to use ILL or CLICS, the process will clear up as more people began to use the service.
- Patrons must renew their books through CUNY+Plus and the lending library’s borrowing policies will apply. They will be allowed to renew online until they receive two overdue notices. After the third notice, they cannot renew. There will be 3-day courtesy notices generated automatically. Undergraduates are blocked after they receive one overdue notice and until they return the overdue item.
- There will be some confusion by patrons and probably library staff as to how to return CUNY items since they might have been ordered through CLICS or ILL (even if we encourage them to order all CUNY items through CLICS.) Over time people will be encouraged to only use CLICS for CUNY material (it’s cheaper, faster...good for patrons and libraries), but at first each department must check their system to see if the item was ordered through ILL or CLICS and give it to the correct department.
- There will be a *Pick List* sheet printed each morning as part of the Circulation reports. This list should be reviewed each day because the items on it will not be repeated the next day. ILL should work with Circ as much as possible to make this a success.
- Each library can shelve items for pickup as they choose. However, CLICS may be separated from ILL, on Hold shelf.
- Julie will ask NYLINK if LAND has larger delivery bags or containers.

A discussion on ILL Labels included the following :

- Jay asked about using printed labels for ILL books. Several members indicated they use ILLIAD or CLIO (management software programs) to generate labels for books sent to other libraries. Gene (LE) indicated he uses a Word document to produce labels and includes the patron’s name, due dates, etc. before printing them out.
- Beth mentioned that some libraries do not want you to put a label on their books, especially the sticky labels. This issue will be discussed as the new ILL Code is debated, but we have to respect any library’s instructions that makes it clear not to use labels. If the library has indicated this as a preference, you can make paper

straps and put the information on the strap rather than the book cover. Straps are also more time consuming. Also, you can also choose not to borrow from those libraries.

- Julie said that LAND has their own label for easy delivery and everyone can access it. You print them out and slip them in the window on the LAND pouches.

E-Serial Holdings discussion included the following:

- Beth asked whether we can get CUNY's E-Serials information into CUNY+ and WorldCat. Pat said that this might be something the Chiefs want to request from Curtis, especially since there is a cost for central to pay. Serials Solution does sell marc records, but it would cost about \$30,000 for the CUNY titles and extra for titles individually held by different libraries. An inquiry about Baruch indicated a cost of \$15,000 for their titles alone. If Central paid for all of the CUNY titles and they asked for the extra titles for Baruch, it may cost only \$3000.
- All but 3 or 4 CUNY libraries use Serial Solutions, which provides monthly updates.
- You can **not** deflect e-serial ILL requests through OCLC since we do not know which titles/databases we are allowed to use to fill ILL requests.
- On behalf of the ILL Roundtable, Evelyn prepared the first draft of a letter to request that CUNY formally look at all licenses and determine which may be used to fill ILL requests.
- If we can use e-serials for ILL, it will be to our advantage to scan and send/receive items quickly.
- Evelyn said that Odyssey (ILLIAD's electronic delivery system) is available as a free download. All CUNY libraries should look at it. The equipment needed is a \$300 scanner and it would probably work. ILL Offices may be able to use their Circ scanner that is used for E-reserves. However, all ILL offices should have easy access to their own scanner.

Metro Delivery discussion included the following:

- Ann asked if there have been METRO problems. She called to report some. LAND will be used for CUNY (and other NYS libraries) as of July 1st, but we will still use METRO for other local libraries.

The next meeting that ILL representatives should attend will be a joint meeting between ILL and Circulation to talk about CLICS. It will be set up for July.

Each library should also organize a local staff meeting before the joint meeting to discuss CLICS with their ILL, Circ and Reference librarians. All members of the library's faculty staff should be aware of this service and have policies on how the service will be handled locally.

Respectfully submitted by,

Beth Posner
October 10, 2006

