

# Texas Public Libraries & Statewide Interlibrary Loan

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# Agenda

- Welcome and introduction
- Program overview
- ILL system changes
- FY 2022 ILL Lending Reimbursement Program
- What's next and staying updated
- Questions



# TSLAC Resource Sharing Programs

- Statewide interlibrary loan
  - Accredited public libraries
- TexShare databases
  - Public and academic libraries
- TexShare cards
  - Public and academic libraries
- E-read Texas
  - Public libraries serving population under 100,000



# Texas Statewide Interlibrary Loan

- Participation in statewide ILL is currently a public library accreditation criteria.
- TSLAC contracts for an ILL system (OCLC's Navigator) available to all accredited Texas public libraries with funding from the Institute of Museum and Library Studies.
- Libraries may charge patrons for return shipping on requests (\$3.82).
- Eligible libraries may participate in TSLAC's annual ILL lending reimbursement program.
- Participating libraries agree to the ILL Code for the United States, Texas ILL protocols, and locally developed policies.





# Texas Statewide Interlibrary Loan

Values of statewide interlibrary loan include:

- Access to materials not available locally.
- Currently a Texas public library accreditation criteria.
- Cost avoidance for limited library budgets.
  - Annual ILL lending reimbursement program
  - Borrowing fee for patrons
- Shelving space may be at a premium.
- Collection development policies may influence resource availability.



# TExpress Courier

The Texas State Library and Archives Commission (TSLAC), through federal funding from the Institute of Museum and Library Services, is able to subsidize courier subscription costs for eligible Texas libraries (currently at about 30%):

- TexShare libraries
- Accredited public libraries
- One subsidy per institution

Amigos Library Services:

[https://www.amigos.org/trans\\_amigos\\_express](https://www.amigos.org/trans_amigos_express)

[tae@amigos.org](mailto:tae@amigos.org)



# TExpress Courier and Navigator ILL Configuration

Texas public libraries live on the statewide resource sharing system, Navigator, can configure their accounts to reflect courier status. Please use the “Report a Problem” link in your NRE account and select:

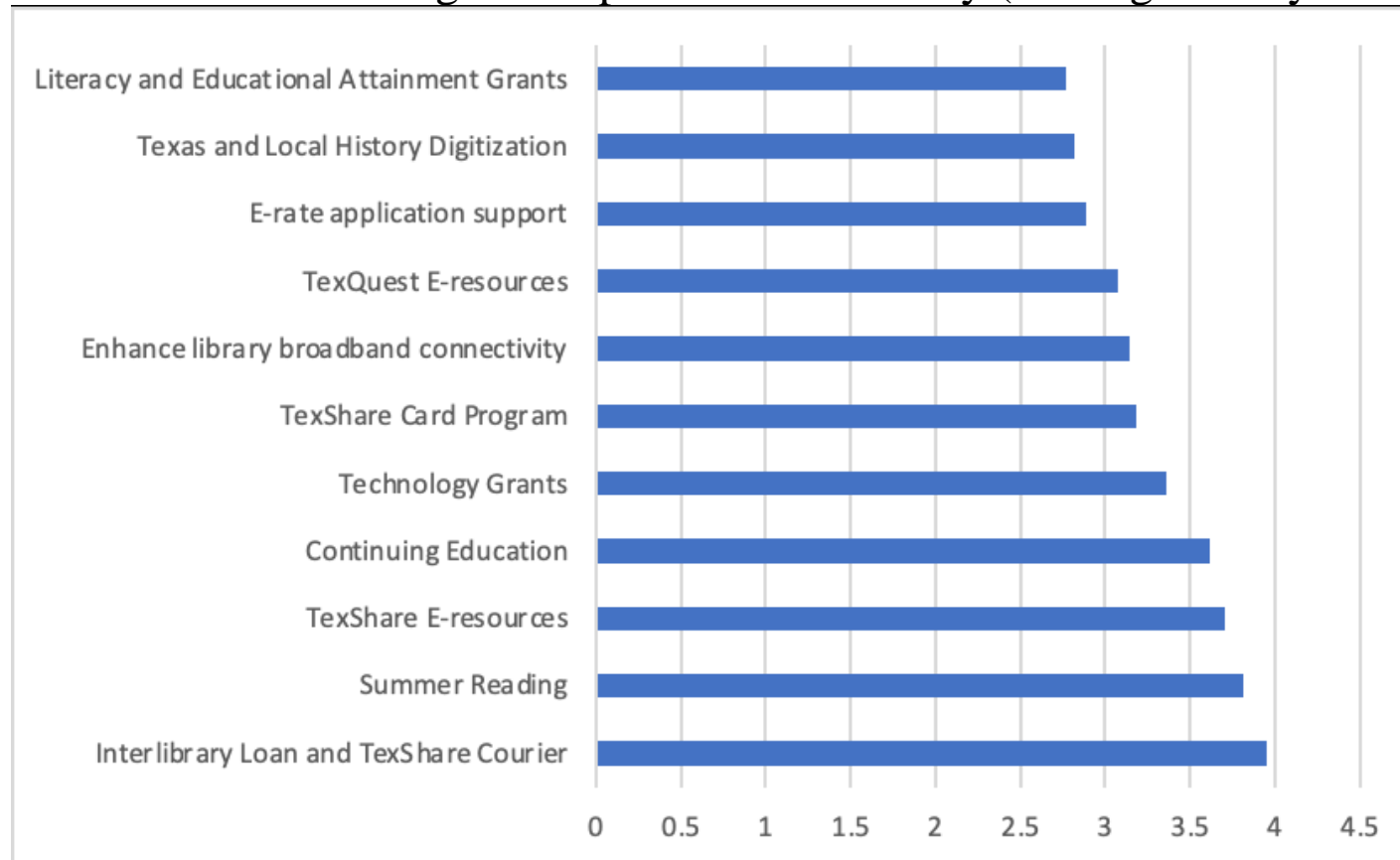
1. Send requests to other courier libraries exclusively.
2. Send borrowing requests to courier libraries first, then non-courier libraries.

You can answer “non-supply” to lending requests from non-courier libraries.



# Texas Statewide Interlibrary Loan

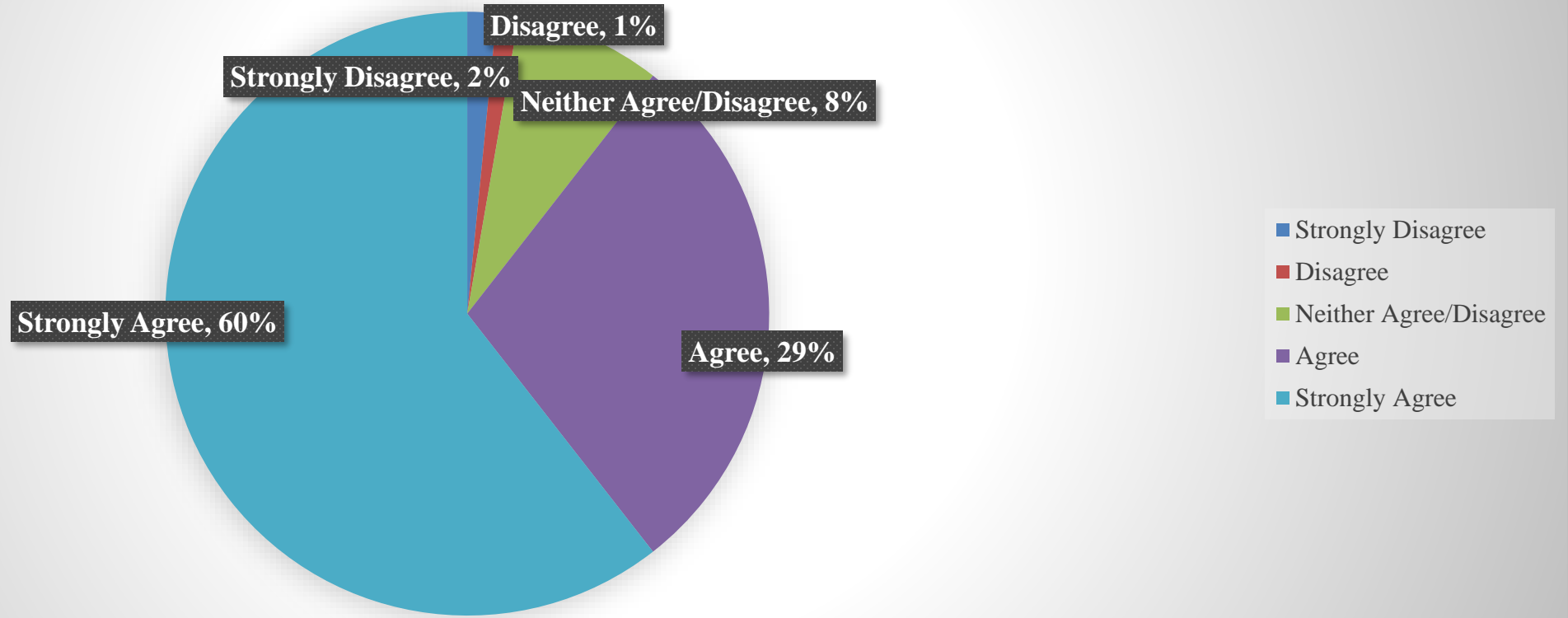
In an online survey conducted as a part of [TSLAC's LSTA Grants to States Implementation Evaluation FFY 2018 - FFY 2022], 338 Texas librarians indicated that among the LSTA-supported programs and services, interlibrary loan and the TexShare courier service had the highest impact for their library (1 being no/very low impact, 5 being very high impact):





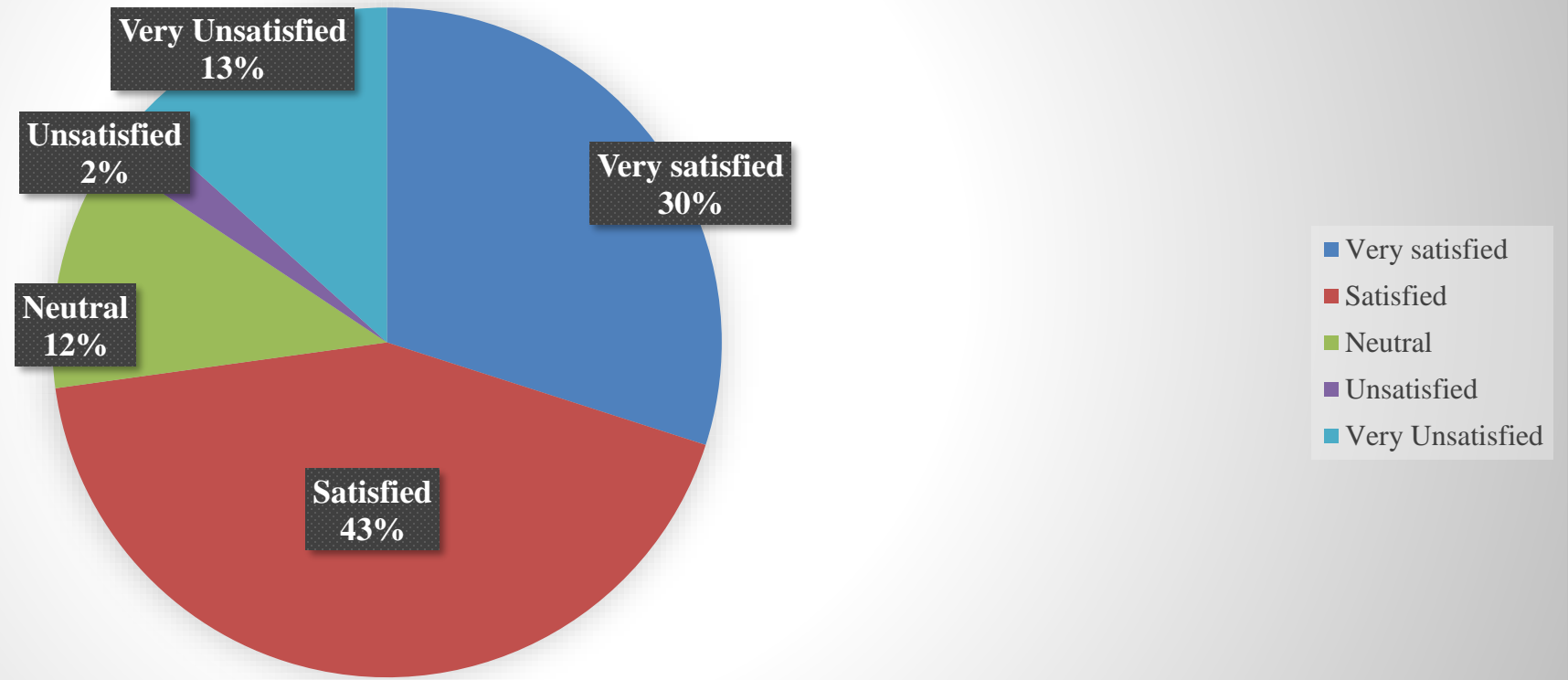
# FY 2021 ILL Satisfaction Survey

Applying the statewide interlibrary loan program in my library has helped improve library services to the public.



# FY 2021 ILL Satisfaction Survey

Overall, how satisfied are you with the statewide ILL system, OCLC's Navigator?





# FY 2021 ILL Satisfaction Survey

## Suggested improvements to the system

- Improve holdings maintenance process.
- Provide notifications for renewal requests.
- Determine when an item should go from overdue to lost.
- Interoperability between Navigator/NRE and ILS.
- Ability to undo actions made in error including “Shipped”.
- Make the “Request Item” button more prominent on Texas Group Catalog.
- Improve communication on the status of requests and notifications that require action.
- Allow manual creation and editing of lender strings.
- Make it easier to order multiple copies of books for programs or book clubs.
- Improve courier service and delivery options.
- Provide list of suggested practices.
- Provide a way to safely loan genealogy materials.



# FY 2021 ILL Satisfaction Survey

## Training suggestions

- Overview of the Navigator system for new staff and refresher course for existing staff.
- Overview of work queues in NRE accounts.
- Configuring NRE accounts with available collections and patron access and limits.
- Clarify how and when to use the “Report a Problem” link in NRE.
- Methods of keeping holdings up to date in WorldCat, Navigator, and the Texas Group Catalog.
- Searching for items in NRE and the Texas Group Catalog.
- Managing lost items from marking items lost to invoicing for lost items.
- Requesting articles through ILL and copyright laws.
- Updating patron permissions in Navigator.
- Creating and editing lender strings.
- How ILL and reference services work together.
- Accessing NRE and OCLC ILL statistics.



# ILL Training and Resources

**TSLAC's ILL webpage:** <https://www.tsl.texas.gov/landing/ill.html>

## **Navigator Resources for Libraries**

- NRE Help: <https://help.vdxhost.com/en/>
- OCLC Navigator Support Site: [https://help.oclc.org/Resource\\_Sharing/Navigator](https://help.oclc.org/Resource_Sharing/Navigator)
- Using WorldCat Navigator
- Navigator Training

## **Navigator Training Materials**

- Recorded Navigator Training Tutorials for Staff
- [OCLC Navigator Training videos on YouTube](#)
- [Navigator Quick Reference Print Guides](#)

**Coming soon: FAQ section on the ILL webpage!**



# Navigator System Configurations

- Libraries can choose to allow patron-initiated requests, with or without review by staff.
- Libraries can allow requests not filled by Texas libraries can go out to WorldShare ILL for fulfillment by other states.
- Libraries determine the number of requests allowed at a time and which patron statuses are eligible to request items.
- Libraries establish which collections they will lend through ILL.



# ILL Activity

	<b>Total Borrows processed</b>	<b>Borrows filled in NRE/VDX</b>	<b>Borrows filled in WorldShare ILL</b>	<b>Total Lends processed</b>	<b>Lends filled in NRE/VDX</b>	<b>Lends filled in WorldShare ILL</b>
<b>Fiscal Year 2019</b>	<b>254,055</b>	169,783 (67%)	84,272 (33%)	<b>158,743</b>	113,273 (71%)	45,470 (29%)
<b>Fiscal Year 2020</b>	<b>161,920</b>	122,481 (76%)	39,439 (24%)	<b>100,456</b>	70,542 (70%)	29,914 (30%)
<b>Fiscal Year 2021</b>	<b>156,590</b>	105,600 (67%)	50,990 (33%)	<b>101,172</b>	72,563 (72%)	28,609 (28%)



# ILL System Changes

- OCLC has announced it will retire Navigator from its resource sharing offerings in 2024.
- TSLAC will be posting a competitive procurement solicitation for a new statewide resource sharing system for Texas public libraries in FY 2022.
- Texas public libraries will continue to use and have access to OCLC's Navigator through *at least* August 2023.





# ILL System Changes

## What libraries can do now:

- Document your current Integrated Library System (ILS) including the version.
- Determine if you have NCIP/SIP2 and Z39.50 functionality available through your ILS, if they are enabled, and if there is a cost associated.
- Note the source of your cataloging records:
  - Provided by vendors or third-party record services
  - Cataloging or CatExpress subscription
  - Original or copy cataloging
  - On-the-fly records
- Consider upcoming weeding projects:
  - CREW: A weeding manual: <https://www.tsl.texas.gov/ld/pubs/crew/index.html>



# ILL System Changes

- Update your holdings in OCLC WorldCat/Texas Group Catalog
- Data Sync & CatExpress

Opportunity for Texas Navigator Libraries to update all current holdings at no additional charge: <https://www.oclc.org/oclc-forms/en/worldcat-holdings-update-project.html>

The deadline for submitting requests to OCLC through their website is **May 31, 2022**. This option is available for only a limited time, so submit your request now to ensure your library's holdings update is scheduled. All data submissions must be received by OCLC by June 15, 2022.



# ILL System Changes

Consider providing feedback of preferred functionalities or improvements:

- Holdings maintenance
- Workflows
- Lending strings
- Book clubs
- Article requesting
- Staff/public interfaces

Email: [shayes@tsl.texas.gov](mailto:shayes@tsl.texas.gov)



# FY 2022 ILL Lending Reimbursement Program

Funded by the Institute of Museum and Library Services' Grants to States Program, TSLAC is able to reimburse libraries for a portion of their direct, out-of-pocket costs associated with statewide ILL participation.

Eligible costs may include:

- Shipping costs and supplies
- Statewide courier subscription fees
- Staff time



# FY 2022 ILL Lending Reimbursement Program

## **Texas Public Libraries:**

- Must be live on the Navigator ILL system.
- Must have provided lends to Texas Navigator libraries between August 1, 2021– July 31, 2022.
- There are no minimum lends required for participation.
- Must submit in the Grant Management System portal starting May 3, 2022:
  - Participation Signature Form – due July 14, 2022
  - Performance Certification Form – due August 31, 2022

## **Texas Academic Libraries:**

- Must have agreed to make their collections available to request by Navigator libraries through the Texas Group Catalog.
- Must submit in the Grant Management System portal starting May 3, 2022:
  - Application Certification Form – due July 14, 2022
  - Participation Certification Form – due August 31, 2022



# FY 2022 ILL Lending Reimbursement Program

## Program Timeline

- **May 3, 2022:** Webinar: FY 2022 ILL Lending Reimbursement Program Overview for Texas Libraries, 10:00 a.m. - 11:00 a.m. Register at <https://www.tsl.texas.gov/ld/ill2022>.
- **May 3, 2022:** Access opens to opt-in to the FY2022 ILL Lending Reimbursement Program in the Grant Management System (GMS) portal at <https://grants.tsl.texas.gov/>.
- **July 14, 2022:** Deadline to submit completed Participation Signature form in the GMS portal, signed by authorized legal entity signatory.
- **August 17, 2022:** TSLAC will notify libraries of total eligible lends and award amounts and begin accepting Performance Certification forms through the GMS portal.
- **August 31, 2022:** Deadline to submit completed Performance Certification form in GMS, signed by Library Director.
- **September 2022:** Reimbursement payments dispersed to legal entities (cities, counties, universities).
- **December/January:** Single Audit Certification forms are sent out to all participants.



# FY 2022 ILL Lending Reimbursement Program

Participating libraries are reimbursed on a per-lend basis

- No minimum number of lends are required
- Managed through TSLAC's online Grant Management System
- FY 2021: \$6.94 per lend
- FY 2020: \$8.17 per lend

<https://www.tsl.texas.gov/ld/ill2022>



# Get Involved and Stay Updated

- **Subscribe to the Navigator ILL Listserv:**  
<https://lists.state.tx.us/mailman/listinfo/navigator-ill>
- **Subscribe to the Library Development and Networking Blog:**  
<https://www.tsl.texas.gov/ld/librarydevelopments/>
- **Continuing Education Calendar:**  
<https://www.tsl.texas.gov/ld/librarydevelopments/ce-calendar/>
- **Review the Request for Information (RFI) and provide feedback:**  
<http://www.txsmartbuy.com/esbdetails/view/306-21-0438>  
(Use Google Chrome browser for best results.)





# Questions?

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ILL Information: <https://www.tsl.texas.gov/landing/ill.html>

Texas State Library and Archives Commission

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