Texas Statewide Interlibrary Loan 2022 Overview

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Statewide Interlibrary Loan Coordinator
February 22 & 23, 2022

1

Agenda

- Welcome and introduction
- Statewide interlibrary loan in Texas
- Current usage
- 2021 satisfaction survey results
- Training and resources
- What's next and staying updated
- Questions

2

Texas State Library and Archives Commission

- Archives and Information Services: Preserves the archival record of Texas, supports research, and makes primary resources available to the public.
- Library Development and Networking: Assists public, academic, and school libraries across the state in meeting the needs of their communities and students.
- State and Local Records Management: Responsible for helping public agencies maintain their public records.
- Talking Book Program: Provides free library services for Texans of any age who are blind or have a visual, physical, or reading disability.

https://www.tsl.texas.gov/

3

Texas State Library and Archives Commission

The **Library Development and Networking Division** provides services to Texans through statewide resource sharing programs that expand the capabilities of local public, academic, school, and special libraries. The division manages programs that provide training, consulting, workforce assistance, library resources, public library accreditation, and grant funds statewide to libraries.

https://www.tsl.texas.gov/ldn

4

Texas Statewide Interlibrary Loan Program

The statewide interlibrary loan program is managed by the Library Development and Networking (LDN) division of the Texas State Library and Archives Commission (TSLAC) and funded by the federal Library Services and Technology Act (LSTA) through the Institute of Museum and Library Services' (IMLS) Grants to States Program .

https://www.tsl.texas.gov/landing/ill.html

5

Texas Statewide Interlibrary Loan Program

Interlibrary Loan (ILL) – The process by which a library requests material from, or supplies material to, another library.

Navigator – OCLC product funded by the Texas State Library that Texas public libraries use to manage and complete ILL requests.

NRE – Navigator Request Engine, the web-based staff portal to manage requests. It requires a staff log in : https://texas.vdxhost.com/nre/

Texas Group Catalog – Public, union catalog available online that allows searching of Texas public library holdings as well as holdings worldwide : http://texasgroup.worldcat.org/

6

Texas Statewide Interlibrary Loan Program

- Participation in statewide ILL is currently a public library accreditation criteria.
- TSLAC contracts for an ILL system (Navigator) available to all accredited Texas public libraries.
- Libraries may charge patrons for return shipping on requests.
- 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.

7

ILL Usage Statistics in Texas

Texas libraries live on Navigator: 546

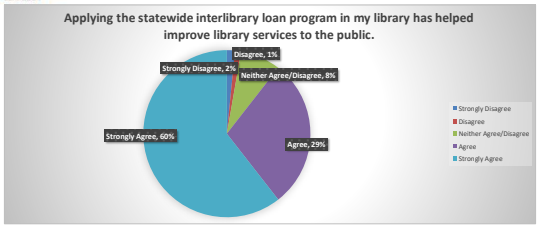
FY2021 (September 1, 2020-August 31, 2021)
Resources lent: 101,172
Resources borrowed: 156,590

FY2020 (September 1, 2019-August 31, 2020)
Resources lent: 100,456
Resources borrowed: 161,920

FY2019 (September 1, 2018-August 31, 2019)
Resources lent: 158,743
Resources borrowed: 254,055

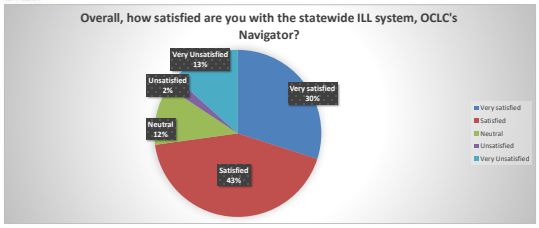
8

ILL Satisfaction Survey



9

ILL Satisfaction Survey



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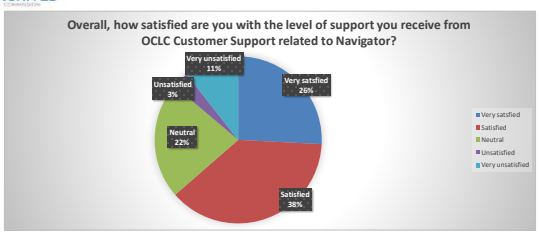
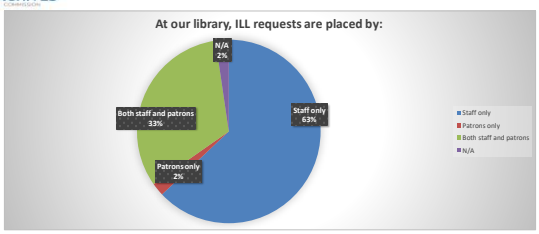
ILL Satisfaction Survey



11

ILL Satisfaction Survey



12

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 or 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.

13

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
- 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!

14

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.

15

Holdings Maintenance & Data Sync

Libraries maintain their catalog holdings in OCLC's WorldCat database by submitting new and deleted material files, annually at a minimum, using data synchronization. Statewide interlibrary loan works most effectively and efficiently when the Texas Group Catalog is up-to-date with participating libraries' current holdings.

Current resources from TSLAC's ILL webpage:
- Checklist for creating a WorldCat data sync collection for updating records (Texas libraries)
- Data Sync Collections Webinar recording (1 hr 16 min 24 sec) *No password required
- Data Sync Collections Webinar Slides

Upcoming training from TSLAC and OCLC will include:
- Brief recordings available to view on demand
- Updated print documentation
- Live webinars

16

Holdings Maintenance & Data Sync

Opportunity for Texas Navigator Libraries to update all current holdings:
https://www.oclc.org/oclc-forms/en/worldcat-holdings-update-project.html

The streamlined process for updating your library's WorldCat holdings is provided at **no additional charge** for eligible libraries. When you send your library's complete MARC 21 catalog data to OCLC, the process matches your records with WorldCat and:
- Adds holdings to matching WorldCat records
- Removes inaccurate WorldCat holdings
- Adds new records when a matching record is not available (optional)
  (All options will be confirmed when our holdings update expert contacts you.)

The deadline for submitting requests 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.

17

ILL System Changes

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

18

ILL System Changes

What libraries can do now:

- Document your current Integrated Library System (ILS) including the version.
- Note if you have NCIP and Z39.50 functionality available through your ILS and if they are enabled.
- 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

19

Get Involved and Stay Updated

- Subscribe to the Navigator ILL Listserv:
  https://lists.state.tx.us/mailman/listinfo/navigator-ill
- Subscribe to the TExpress Courier Listserv:
  Send names and email addresses to tae@amigos.org.
- 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/esbddetails/view/306-21-0438 (Use Google Chrome browser for best results.)

20

Questions?

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www.tsl.texas.gov/ldn
www.tsl.texas.gov/landing/ill.html

21