

Appendix 4: TexNet Center Site Visit Questionnaires

Onsite Checklist

General/Administrative

Is ILL department a part of another division within the library?

Are lending and borrowing functions performed by different staff?

Are referral requests handled differently from local patron requests?

How are stats patron v. referral handled?

FTE= _____ hours/week

List number of FTE for each level of staff	
Administrative head	
Support Staff Supervisor	
Professional non-supervisor	
Support staff	

Involvement/Training of Reference/Frontline staff

Billing/invoicing in-house or outsourced to library accounting staff

Interaction with collection development

for local patrons

for referral requests

Square Footage

Policies

TexShare card

Do you borrow for TexShare card members?

How do you handle charges from lending libraries?

Do pass on charges to local patron?

	Local patrons	Referral lib
Limit requests		
Number		
Format		
Music CD		
DVD		
VHS		
Other		

Workflow

Percentage of requests submitted electronically	
Percentage attached to bib	
If not, who verifies TN or RL	
Percentage patron-initiated	

Delivery Methods	
Mail	
Courier	
UPS/FedEx	
Fax	
Electronic/Doc Del (Ariel, Odyssey)	

Workstation set-up	
Number	
Who has access to what	
Who owns them	

Equipment	
Dedicated photocopier	
Scanner	
Dedicated printer	

ILLiad/CLIO checklist	
Direct Request	
Custom Queues	
Labeling functions	
Return Labels	
Bookstraps	
Couier Labels	
Other	
Z39.50 searching	

How is patron data added to ILL management system?

ILS patron holds for referring requests?

Borrowing

Keep paper files (yes/no)

Can patron track request status?

Circulation updating by ILL or circ staff

OCLC IFM	
LVIS group	
AMGS group	

Custom Holding Paths

How built

How often updated

Other electronic borrowing methods

Reasons for unfilled (visceral sense)

Patron pick up options

Main only

Branches

Lending

Keep paper files (yes/no)

Request formats received

paper	
electronic	
phone	
fax	
email	
ALA form	

Reasons for unfilled (visceral sense)

Priority service

in state v. out of state

Photocopy by ILL staff or other dept?

Union Listing?

**TexNet Center:
Staff Present:**

Staff Survey

- 1) Tells us about policies for lending (best practices, protocols, etc.)

- 2) Tell us about policies for borrowing.

- 3) Do you feel that you are utilizing other TX libraries to their fullest?

- 4) Ever use Lib of TX to fill borrowing requests? Why, why not?

- 5) Are you a net Lender or borrower?

 Any particularly heavy borrowers?

 Any particularly heavy referring libraries?

 Is there a borrowing string protocol? Load leveling?

- 6) Issues with patron initiated requesting?

- 7) Issues with unmediated, direct requesting?

- 8) What is your library's ILS? Does it allow patron placed holds?

- 9) Does ILL process all mailed items or is there a central mailroom? Budget for USPS?

- 10) Have you ever discussed direct shipping to customers? Issues?

- 11) How do you feel about the quality of your collection generally?

- 12) Does ILL work with the collection development staff?

- 13) Have you ever discussed requests being vetted by collection management staff for consideration of purchase? Issues?

- 14) Have you ever discussed a buy on demand model? Issues

- 15) What are ILL staff training issues?

What kind?

ILLiad customization?

16) What about professional development opportunities, meetings, networking?

17) Are there issues regarding ILL equipment?

18) Do you have problems getting technical support?

19) Do you have issues with software?

20) What is the biggest impact on TAT?

equipment issues

ergonomic issues

space issues

delivery: courier

internal courier (branches)

other

staffing

21) What is your opinion of the Courier service quality? How could it be improved?

22) What percentage items are delivered via courier?

Does the courier go to any branches?

23) How do you encourage libraries to use the referral service?

24) What are your ideas for improving your service?

For your patrons?

For the referring libraries?

25) What roadblocks do you encounter in making improvements to service?
(ask about patron survey link on website)

26) What are appropriate measures of accountability?

27) Ideas for change in organizing TexNet Centers and their service?

Other comments?