

APPROVED JAN 5, 2000 LC

Date: December 22, 1999
TO: Library Council
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FROM: Task Force on Request Item Capability: Lynn Chmelir, Al Cornish, Ken
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RE: **Report from the Task Force on Request Item Capability**

The Task force has been meeting since early October to develop procedures to implement the "Request Item" capability that is available through Griffin. An earlier draft of this document was widely circulated to WSU Public Services department heads, Branch Campus librarians, WSU Libraries administration, EWU Library administration, and circulation supervisors at WSU and EWU sites. The following Report incorporates many changes that were suggested in this review process. We would like to see "Request Item" operational as early in the spring semester as possible. The Task Force requests that Library Council accept this report so we can begin implementation soon.

You will notice that in several places, procedures are qualified with "in Pullman." It is recognized that these items are really local decisions that can be done differently in different libraries. As with all new enterprises, we think these decisions are good ones but are prepared to revise them if problems develop during or after implementation of Request. Two months after Request is operational, the Task Force will reconvene, solicit opinions, and make recommendations for changes that are needed.

Introduction:

The Task Force goal is to implement patron-initiated requests for library materials, with timely delivery from each of our EWU/WSU shelving locations to each of our circulation locations for patron pickup. As we planned to implement this internal Griffin service, we also tried to anticipate some of the similar issues that will arise with the 6-institution Cooperative Library Project (CLP) union catalog borrowing service.

Overview:

EWU and WSU students, faculty, and staff will be able to request delivery of library materials they find in Griffin for pickup at their most convenient circulation desk. The Request button will appear on the screen along with the bibliographic information. After clicking "Request," the patron immediately is told if that item does not circulate (reference, reserve, etc.) before going further. (See below for recommendations on what

does and does not circulate via "Request.") If the item is eligible to circulate, the patron is prompted to fill in his or her name, ID number, and pin. There is a pull-down menu to request a pickup location. The patron selects a pickup location and the system sends a confirmation message that the item has been requested.

A Griffin message that an item is wanted goes to a queue at the lending location. Each lending location will print paging slips to clear its queue of requests on an efficient schedule to facilitate speedy workflow. Paging slips are printed in call number order to facilitate picking from shelves. At WSU Pullman, temporary employees (student workers) under the supervision of circulation staff at all shelving locations will print paging slips and page materials.

A copy of the paging slip is placed with the item and it is wanted to "in transit" status on Griffin. For local Pullman delivery, a colored "Save in Transit" slip will be attached to the item and it will be placed in a designated location for the WSU Libraries mail pickup. For delivery from Pullman to EWU and the WSU Branch Campus libraries as well as for delivery among EWU and the WSU Branches, the items will be placed in a colored canvas bag and a preprinted label with the destination address will be placed on the bag. These items will be placed in a location designated for courier pickup.

Items will be transported among the six Pullman libraries twice each day, late morning and late afternoon. Those destined for Pullman libraries will be sorted for delivery en route, if possible, or in the Holland/New Library mailroom for the next delivery. Those destined for EWU and the WSU Branch Campus libraries will be placed in the mail room for courier pickup—usually around 1 PM. EWU and the WSU Branch Campus libraries will devise similar routines to insure speedy turn-around time.

Items will be delivered to the WSU mailroom and sorted for delivery to Pullman libraries via the next mail delivery. Again, EWU and the Branch Campuses will arrange for convenient delivery.

When the items reach the proper hold pickup location, they will be wanted to "hold" status. In Pullman, we will not send notices that items are ready. Patrons will learn to check their patron records for listings of items in transit and on hold. (Circulation Working Group is being consulted on this point. If we don't print notices for Request, we can't print notices for regular holds.) When patrons claim their requested materials, they are charged out to the patron for the item's regular circulation period.

When items are returned, they are discharged, wanted back into "in transit" status, and sorted for their return trip. Returns are transported in the same timely manner as requests. After materials reach their home shelving location, they are finally discharged and reshelfed.

Eligible borrowers:

All students, faculty, and staff at EWU and WSU are eligible borrowers. The Griffin patron file will determine eligibility based on the information that the patron supplies at

the screen prompt. Request is not available for guest users that are not affiliated with the universities. See below for special arrangements to deliver items to valid users that are not located near a hold pickup location (EDP students, Ag research faculty, etc.).

Hold pickup locations:

The hold pickup table will be reconfigured to the following wording. The box on the screen will say something like “Click to choose.” When clicked, the following menu appears and the patron then clicks on the desired pickup location.

- EWU Cheney JFK Circ Desk
- EWU Spokane CALS Circ Desk
- ICNE Spokane Circ Desk
- ICNE Yakima Circ Desk
- WSU EDP Delivery
- WSU Extension Office Delivery
- WSU Learning Center Delivery
- WSU Olympia Energy Circ Desk
- WSU Pullman Ag/Sci Circ Desk
- WSU Pullman Archt Circ Desk
- WSU Pullman Brain Ed Circ Desk
- WSU Pullman Holland Circ Desk
- WSU Pullman Owen Circ Desk
- WSU Pullman Vet/Med Circ Desk
- WSU Spokane CALS Circ Desk
- WSU TriCities Circ Desk
- WSU Vancouver Circ Desk

Several of these WSU locations are not circulation desks: EDP Delivery, Extension Office Delivery, and Learning Center Delivery. Requests for EDP Delivery will be routed to the EDLS office in Holland/New Library for mail shipment to EDP users. Requests for Extension Office and Learning Center Delivery will be routed to the ILL office in Holland/New Library for mail shipment to those users.

Item types eligible for Request:

In general, items that circulate for 14 days or more will be eligible for Request. Since EWU and WSU have made some different decisions about circulating formats that currently share an Item Type, EWU will make the necessary changes. The circulation period begins after the transit period when the item is wanded out to the patron. We can revisit the decision of what circulates again after the service is operational. For now, the following Item Types will circulate via Request.

- WSU
- 005 Monograph 2 weeks
- 006 Monograph 30 days
- 012 Serial 2 weeks
- 013 Serial 30 days

023 Music score 30 days
047 Thesis 30 days

EWU
6 Monograph 1 month
12 Serial 2 weeks
13 Serial 1 month
16 Map
20 Slide
23 Score (Music)
28 Poster
29 Flashcard
30 Computer file
32 Sound recording
33 Audio Cassette
34 Audio CD
35 Kit
37 Game
43 Microfilm
44 Microfiche
45 Microprint
47 Thesis
56 Curriculum lab
57 Data file
58 Folio
62 Record

In order to emulate the CLP union catalog service, the basic loan period for Request items will be 21 days between institutions. WSU materials will circulate to WSU users for their regular circulation period. Similarly, EWU items will circulate to EWU users for their regular circulation period. But between institutions, there will be a single loan period of 21 days. Transit time is not counted for Request, so the clock does not start ticking until the item is picked up from the hold shelf and charged out to the patron. It stops when it is wanded back into "in transit" status to return to the owning location. (The CLP loan period will probably be 21 days. With CLP, the transit time is added to the loan period, making it longer, but not with Request. If CLP picks a different loan period, we will revisit this decision.)

Delivery service in Pullman:

In Pullman, materials will be transported twice daily among all six libraries. The delivery truck leaves Holland/New Library to make the libraries' rounds between 10:30 and 11. The van goes to Education, Architecture, Owen, Vet/Med, and Ag Sci in succession before returning to Holland/New Library. Items are sorted into tubs for each library en route so if something is picked up that could be delivered on the same trip, it is delivered. Occasionally there are pickups or deliveries at the Music Listening Library. Music must

notify the mailroom if it has materials to be picked up. A second mail delivery will occur in the late afternoon between 3 and 5. For Pullman campus delivery we will use the colored "save in transit" slips. If that proves unsatisfactory we can revisit this decision.

Courier service for EWU and WSU Branch Campus Libraries:

The WSU courier to the Branch Campus libraries picks up in the Holland/New Library mailroom between 1 and 2 PM. In Pullman, the Pony Express that serves EWU picks up in the same place about the same time. Currently we are using canvas bags for the WSU branch campuses. With the anticipated volume going between EWU and WSU, canvas bags will be needed for transport among EWU and the WSU Libraries in Pullman and elsewhere. We will monitor volume and begin to use reusable plastic tubs for transport if volume warrants that.

It will be necessary for all circulation units to be accessible from a single courier except the three dummy locations, noted above, that will be served by mail from Pullman. The courier delivers items destined to the dummy locations to Pullman Holland for routing to EDLS or ILL.

CLP is presently looking at delivery issues and eventually the Request service will use whatever courier service serves CLP. Meanwhile, for the service to be efficient, each library must be a primary dropsite on the existing courier service operated by Michael Crose (LME). The Task Force recommends that those libraries that are not already primary dropsites sign up for service to begin in January with LME. The Task Force recommends that all WSU/EWU dropsites arrange for courier service via the LME contract negotiated by Orbis. It has performance criteria in place that are not available by working directly with LME. Details about preprinted address labels for the bags will be worked out with the courier service.

Since the Yakima campus of ICNE is not a big operation, ICNE may choose to serve that location by mail from ICNE in Spokane as Pullman will serve EDP students.

Miscellaneous decisions:

We agreed that we do not want to display the "note" field in the prompt screen. III gives us the option for notes but we think it would add confusion.

There are several ways to print notices. Systems will work with each unit to be sure that paging slips can be printed efficiently.

In Pullman, all items will be transported via vehicle. We do not plan to walk materials among Pullman libraries because of weight.

In Pullman, the colored "In Transit" forms are the only routing slips that will accompany Request materials. The white half-sheet routing slips will continue to be used for other purposes but not for Request.

All items are wanted into "in transit" status, both going out and coming back.

In Pullman, MASC will no longer be a hold pickup location since we do not want Request items going there for pickup. The Circulation Desk in Holland/New Library is the only hold location to serve that building.

Some remote WSU users will not know which pickup location to select. We will try to identify those users and let them know, by phone, which location is best suited to meet their needs. We think this group is not large.

Hold pickup shelves will be cleared on the regular schedule already established—every seven days.

If a requested item is missing from the shelf, a human will forward the request to another location, if possible. If there is no other copy the patron is notified that the item is missing. Items found missing are reported as usual. Missing items remain in the hold queue for 3 months. (This decision is being reviewed by the Circulation Working Group.)

Patrons are responsible for fines and replacement charges for lost materials that have been established by the lending library. When CLP establishes a fine policy, this decision will be reviewed for consistency with CLP.

Materials are sent via the most direct route: WSU Branch Campus libraries will ship directly to each other and EWU; EWU will ship directly to WSU Branch Campuses as well as Pullman. Pullman will not reroute materials except to the dummy locations that do not have circulation desks, as described above.

As Systems implements the Request button, all libraries will be invited to provide feedback on screen displays, etc.

Each circulation location will designate one staff member to be the Request contact person. We will also identify their supervisors for times when they are not available. A list of these people will be sent to every circulation location so we know whom to contact if problems arise.

In Pullman, that contact person will have the responsibility to lead the temporary employees (student workers) that do the paging and packaging. Their job descriptions will be amended to include this responsibility. During vacation periods, staff will do the paging and packaging if temporary employees are not available.

In Pullman, we will prepare a training manual for the employees that page and package Request items.

Before the implementation of "Request," there will be a training session for staff involved in circulation and delivery of materials.

Budget considerations:

WSU Pullman needs to fund a second mail delivery on weekday afternoons. This will require about 10 hours per week. Either a temporary employee (student worker) or a staff member could drive the delivery van.

WSU and EWU need to purchase canvas bags as soon as possible. Although it would be great to wait for CLP bags, they won't be available in time to start this for spring term. We recommend purchasing 200 bags at about \$8 each (\$1,600). We recommend that we share the cost as follows:

WSU Pullman	\$700
EWU	\$500
EWU Spokane	\$ 50
WSU Spokane	\$ 50
Tri-Cities	\$100
Vancouver	\$100
ICNE	\$100.

The WSU Branch Campus libraries and EWU may also need to incur expenses to implement the delivery service that we have not been able to anticipate. Upgrades to courier service is one example.

Implementation timeline:

January 5: Task Force report goes to WSU Library Council for approval.

January 6-27: WSU and EWU coordinate plans for system messages, Item type codes, loan rules, etc.; Systems works to implement Request; Libraries order canvas bags.

January 28-February 10: Training for circulation and delivery staff; Request function tested in all EWU/WSU libraries; Pullman campus initiates afternoon mail delivery.

February 11: Request goes live in all EWU/WSU libraries; PR campaigns at EWU and WSU to publicize the service; User Education incorporates Request into classes.