

GAELIC/SALIT INTERLENDING PROJECT

UNFILLED INTERLENDING REQUESTS AND RELATED MATTERS

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ANNEXURES

- Please check Annexure 1 in order to familiarize yourself with the JC Codes used for your library or your library branches.

1	List of library sites and their JC codes
2	Requests placed to national libraries and fill rate
3	Requests received from national libraries and fill rate
4	Grouping of libraries according to number of requests placed
5	Grouping of libraries according to number of requests received
6	Grouping of libraries according to fill rate - Requesting
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11	Reasons for unfilled requests – Requesting point of view
12	Reasons for unfilled requests – Supplying point of view
13	Turn-around time
14	Problems encountered at the library sites

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University of Johannesburg (Doornfontein Campus)

University of Pretoria

University of the Witwatersrand

Vaal University of Technology

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INTRODUCTION

The 2003 annual report of the Interlending workgroup, called attention to the low fill rate of national interlending transactions. Concern over this matter led to speculation, but the causes for the low fill rate performances have not been verified. The SALIT Trust has approved R15 000 for a project in order to

- investigate the reasons for the non-supply of documents
- determine the accuracy of the statistical data on the ReQuest system
- suggest remedial actions to address the problem.

A workgroup of experienced interlending workers was appointed.

Antonette Davis – University of Johannesburg (Doornfontein)

Marlane de Bruyn – Unisa (Pretoria)

Rebecca Fani – Vaal University of Technology

Heidi Visser (Coordinator) – University of Pretoria

Janet Zambri – University of the Witwatersrand

The research was conducted with regard to national interlending only.

1. DATA RETRIEVAL

The workgroup decided to use a set of sample data for the period February to April 2004. Different sources for the data were used.

1.1 ReQuest System Data

- IFLA statistics to calculate the fill rate
- Reasons for non-supply
- Performance levels of libraries

1.2 “Rtf” data (Rich Text Format)

- Determine GAELIC involvement
- Analysis of specific requests

1.3 Manual statistics supplied by the North-West University, Potchefstroom campus

- Determine accuracy of the system statistics

2. RELIABILITY OF THE DATA ON THE REQUEST SYSTEM

In order to verify the accuracy of the management information retrieved from the ReQuest system, a sample set of manual statistics was compared with the system statistics for the same period. The manual statistics provided information on filled requests on the requesting side. The few unmatched requests in the end, were

analysed and it was found that human error and/or a time factor were responsible for the unmatched requests

Unmatched requests on the system due to –

- * Documents that were requested before the test period started and received within the test period, thus no matches on the manual statistics
- * Documents were shipped during the last days of the test period and received the following month thus not noted on the manual statistics.

Unmatched manual requests due to –

- * Documents that were neither shipped nor received on the system
- * Expired or cancelled requests that were filled in spite of the negative status on the system
- * Documents that were manually received within the test period, but they were not received on the system, thus no matching record numbers were found on the system.

The workgroup concluded that the management information on the system is accurate and reliable and can be used in this research project.

3. TRANSACTIONS HANDLED AND FILL RATE (Annexures 2 & 3)

Libraries differ with regard to the number of interlending requests they handle. Some libraries request and supply almost evenly while others are net lenders or net suppliers. The fill rate, either as requester or supplier, is one of the indicators to measure interlending performance. Other indicators are turn-around time, cost effectiveness and customer satisfaction.

3.1 Supplying Fill Rate

The supplying fill rate is usually lower than the requesting fill rate. Requests are marked as unfilled if the requested documents are not found at the first attempt, so that they can immediately move on to the next library where they could probably be filled. This procedure causes a low fill rate on the supplying side.

3.2 Requesting Fill Rate

The fill rate on the requesting side is most important. It is crucial to satisfy the requesting client's needs even if a request may be sent to several libraries before it is filled.

3.3 Grouping of libraries (Annexures 4-7)

In order to benchmark libraries and to reach conclusions, libraries were grouped according to the number of requests they have handled and according to their performance (fill rate). On the supplying side we have added the number of expired requests, as it also reflects a library's performance.

3.3.1 Grouping of Libraries According to Size (Number of requests handled)

The 6 libraries requesting more than 1000 documents each, were responsible for 53% of all the requests placed during the test period (annexure 4). On average this grouping has had the highest fill rate, received the lowest number of documents from Gaelic libraries and their turn-around-time for books was the best (annexure 5). Smaller libraries tend to request more from GAELIC libraries. On the supplying side the 8 libraries receiving more than a 1000 requests each, received 76% of all requests

during the test period. On average these libraries have the highest fill rate, the least expired requests and the best turn-around time for books.

Library Size (Number of requests handled)	Average fill rate of requesting GAELIC libraries with national libraries as suppliers		Average fill rate of GAELIC libraries supplying to national		
	No of libraries	Average fill rate	No of libraries	Average fill rate	Average expired
<1000 (Large)	6	77%	8	57%	5.8%
300-999 (Medium)	14	75%	11	50%	17%
0-299 (Small)	19	66%	20	36%	27%
		National average 76%	National average 55%		

3.3.2 Grouping of Libraries according to Fill Rate (annexures 6 & 7)

Grouping libraries according to fill rate does not produce a definite pattern with regard to turn-around time. On the supplying side it can be said that libraries with a higher fill rate, do have less expired requests.

Requesting point of view			Supplying point of view			
Fill Rate %	No of libraries	% requests placed	Fill Rate %	No of libraries	% requests received	Expired requests
80%+	12	23%	<60%	6	23%	6%
70-79%	14	57%	50-59%	8	41%	9%
60-69%	6	15%	40-49%	10	28%	18%
39-59%	6	5%	30-39%	5	3%	27%
			0-29%	10	6%	36%

3.4 GAELIC Involvement and Fill Rate

Experienced requesting staff can accomplish a high fill rate by making the correct choice of supplying libraries after verification. There is no definite connection between fill rate and choosing GAELIC libraries as suppliers. One of the large libraries with a national fill rate of 79% received only 40% of its documents from GAELIC libraries whilst the library with the lowest national fill rate of 39%, received 86% of its documents from GAELIC libraries.

4. GROWTH IN THE NUMBER OF IL REQUESTS WITHIN THE GAELIC ENVIRONMENT (Annexures 8 & 9)

In spite of the fact that information on the internet has become more abundant and accessible, and that clients are able to search and retrieve their own information, the number of interlending requests has grown over the past five years. Ever decreasing budgets and high prices of books have impacted on the number of requests for loans. Unfortunately the national figures for 1999 were not available in order to compare the growth nationally

Growth In Filled Documents Over The Past Five Years For The Period February – April 2004

	Requesting Point of View			Supplying Point of View		
	Books	Articles	Total	Books	Articles	Total
1999	9514	29884	39398	2577	7870	10447
2004	18764	39216	57980	24915	41947	66862
% Growth	97%	31%	47%	160%	38%	54%

5. SUCCESS IN SELECTING SUPPLYING LIBRARIES

Although this research project has focussed on unfilled requests, the question may be raised as to how often requests are sent to supplying libraries, before they are filled. An analysis of a sample of filled request, chosen at random and covering requests for books and articles, gave the following results.

Number Of Tries Until A Request Is Filled

1	2	3	4	5	<5	Total analysed
63%	21%	9%	3%	2%	2%	438

It is satisfying that 84% of the requests were filled within two tries. Training and experience on the requesting side enhance the successful choice of supplying libraries.

6. PROFILE FOR EACH LIBRARY (To be supplied to each library site)

A profile has been prepared for each GAELIC library site so that library management and the interlending staff can study their interlending performance during the test period February – April 2004. In order to benchmark the library's performance, the GAELIC average has been included for each action.

The profiles contain data on the requesting and supplying performance and include –

- Total number of new requests placed or received and documents received or supplied. The fill rate was calculated.
- GAELIC involvement regarding requests sent or received
- The reasons for unfilled requests
- The turn-around time from the requesting and supplying point of view

7. UNFILLED REQUESTS (Annexures 10, 11 & 12)

Data retrieved from the ReQuest system gives us a break down of reasons for unfilled requests on both the requesting and supplying sides.

The project team analysed a sample of unfilled requests of each library in order to detect a pattern, or to determine if a specific library has a problem that need to be addressed. Few major problems were found, but smaller mistakes were picked up at most of the libraries, indicating that a refreshing training workshop will be beneficial. Although 23 possible reasons are listed to indicate why requests could not be filled, 64% of the failures were for the following reasons:

Requesting Point of View		Supplying Point of View	
Not owned	19%	Not owned	17%
Expired	18%	Expired	10%
In use	16%	In use	20%
Not on shelf	11%	Not on shelf	13%

7.1 Not Owned

Possible reasons for sending requests to libraries that do not own the requested documents-

- Requesting staff in error due to
 - negligence and lack of commitment
 - working under pressure due to lack of sufficient staff,
 - lack of experience and/or training

- Documents not included on SACat or other databases.
- Incorrect information on SACat. Research indicated that 20% of unfilled reasons were due to incorrect or incomplete holdings on SACat. This not only prolongs the turn-around time, but also impacts negatively on staff time both at requesting and supplying libraries. The incorrect information is due to libraries not updating information regarding
 - lost books
 - books on order but never received
 - numbers of volumes not received
 - cancelled serial subscriptions
 - Incomplete holding information with regard to journals where only title holdings are indicated

Requesting staff and end users often do not open all items for one title on SACat, thus they are unaware of all the holding libraries. An item with only one or two holdings is transferred to the request form. If unfilled, the requests is cancelled. “Not Owned” is often incorrectly used to indicate that a specific number of a serial has not been received. The correct reason should have been “Lacking”

Unverified requests are often sent to libraries – many of these are often (ironically) filled!

Remedial Actions

- *It is important that all libraries should give special attention to updating their holdings on SACat and to ensure that their whole collection is included in SACat. Numbers of volumes that have not been received should also be reflected in the SACat holdings.*
- *Training – All items for a specific title on SACat must be checked before transferring a document to the request form.*

7.2 Expired Requests

- 98% of all expiries are due to requests not being attended to at supplying libraries within the stipulated time.

Remedial actions

- *Training.*
- *Supplying staff must render a fast and efficient service of high quality.*
- *Supplying staff must check incoming requests on a daily base.*
- *All requests not filled within one day, must either be filled, “will supplied” or marked as unfilled by the second day.*
- *Supplying staff must ensure that all documents are shipped timely and correctly on the system.*
- *Requesting staff must receive all requested documents on arrival on the system.*

7.3 In Use

Libraries buy fewer titles and less copies of one title, as a result of an ongoing cut in budgets. Due to the greater usage of available books, libraries are requesting more books on interlending and have to reroute the requests more often.

Books are often not returned on time.

Remedial Actions

Unfortunately requesting IL staff is unable to determine the availability of open shelf books whilst verifying on SACat.

- *Libraries must try to be self sufficient with regard to books for undergraduate students.*
- *Stricter ruling regarding the timely return of books will make books more available.*
- *Requesting staff must try all available libraries, if the need by date allows it.*
- *Reservations may be requested if the due date is less than 3 weeks, instead of canceling the request.*

7.4 Not On Shelf

The in-house system often shows books to be “In” but they are not to be found on the shelves. This can be caused by -

- Books shelved incorrectly.
- Books not being returned to the shelves soon after they have been checked in.
- Students hiding books, and library staff not issuing books to themselves.

Remedial Actions

- *Each library must take the responsibility to ensure that the infrastructure is in place to get books that have been returned, back onto the shelves fast and accurately.*
- *Regular shelf reading to trace books that have been shelved incorrectly.*
- *Interlending staff must look wider for a book that is not on the correct place – it is often found nearby.*
- *Training is essential for shelving and shelf reading staff.*

7.5 Non Circulating

- Requesting library staff do not check the loan status of an item on SACat (R = Restricted or X = Not for loan)
- Requests are sent to libraries at random in the hope that books have been moved to the open shelves without updating SACat
- IL staff, working with prerequests placed by end users, do not verify on SACat. The loan status does not appear on the request screen along with the holdings of a document. Requests are thus sent to libraries without verifying the loan status.

Remedial Actions

- *IL staff must be trained to recognize the loan status of documents on SACat*
- *Libraries must ensure that the information on SACat is reliable to prevent requests being sent at random*
- *Sabinet Online must be requested to consider adding the loan status of documents on the request forms.*

7.6 Not Found As Cited

- IL staff or end-users sometimes copy the bibliographic information incorrectly.
- The bibliographic information in references is often incorrect and cause time wasting procedures for both the requesting and supplying IL staff.

Remedial action

End-users and IL staff must ensure that bibliographic information, copied for interlending purposes, must be correct.

7.7 Other

This reason is used if none of the given reasons fit a specific unfilled request. Analysis of unfilled requests has shown that “Other” is often used in the place of a suitable listed reason.

Remedial action

- *Training in the use of the correct reasons*
- Sabinet Online will be requested to revise the list of reasons for unfilled IL requests. Some of the reasons can be eliminated whilst others can be renamed. “Lacking”, for example can be changed to “Gap in Stock”.

7.8 Comments and observations

Training, commitment and motivation of library staff will lead to service excellence.

Regular analysis of unfilled requests will give an indication of inexperience and training needs.

IL staff is ideally placed to do quality control on SACat and their in-house systems, alerting cataloguing authorities of database inaccuracies.

The importance of accurate shelving must be stressed, as it has an impact on library services as a whole.

Students and researchers have increasingly access to more databases and thus find more relevant information. Libraries should empower their users to retrieve as much information as possible from e-journals and other sources through the internet. The interlending service will eventually be a specialized unit to trace ‘difficult to find’ documents.

8. INSUFFICIENT STAFF CAPACITY

Cuts in budgets often result in vacancies not being filled. The academic year causes fluctuations in the workflow. Peak periods alternate with relatively quiet periods. Staff capacity often does not allow for the increase of work over the peak periods, thus stressed staff do not work as accurately as usual. An indication of average time needed for interlending processes was determined but must not be seen as conclusive. (A proper time survey can be undertaken at a later stage for benchmarking purposes).

An elementary time survey was conducted with the aid of a few library sites and the average time to fill a request was determined. By checking the average number of requests handled on a monthly base, library management can calculate if the staff capacity is sufficient during peak periods.

Process	Ave time needed	Number of requests handled	Ave working days per month	Ave working hours per day excluding lunch & tea	Multiply average days & hours to get average hours p.m.–	Multiply Ave hours p.m. with average number of requests for month to calculate average time needed for IL process
Requesting: Books Copies	19 min 13 min		20	7	140 hours	
Supplying: Books Copies	15min 11min		20	7	140 hours	

9. LIBRARY PERFORMANCE REGARDING TURN-AROUND TIME AND RELATED MATTERS (Annexure 13)

Turn-around time from the requesting point of view is the time calculated from placing a request until the requested document has been received on the system.

From the supplying point of view the time is calculated from receiving a new request until the document is shipped on the system.

As mentioned earlier, turn-around time is one of the indicators when measuring interlending performance, both as requesting and as supplying library. Research on the turn-around time was included in this project, in order to determine the impact of unfilled requests on the turn-around time.

The current data available on the ReQuest program to calculate the turn-around time, allows us only to determine the minimum number of days to fill a request, where as the previous interlending system allowed us to calculate the real or maximum number of days to fill a request. The current situation is unacceptable and has to be addressed.

Although one can't really compare the results of the two different systems, the following can be said reviewing the 1999 and 2004 figures –

- **Supplying point of view** - even though the number of requests has increased dramatically over the past five years, there might have been an improvement in the turn-around time.
- **Requesting point of view** - it is disheartening that, in spite of the courier services to other consortia and the general use of ARIEL by larger libraries to ship articles, the turn-around time from the requesting point of view has definitely deteriorated.

Turn-Around time of 1999 and 2004

	Requesting Point of View		Supplying Point of View	
	Books	Articles	Books	Articles
1999 (Exact number of days- maximum)	6.35 days	4.1 days	5.25 days	3.6 days
2004 (Minimum number of days – inaccurate)	9.8 days	5.2 days	2.3 days	1.6 days

9.1 Unfilled requests and Turn-Around Time (Requesting point of view)

A high percentage of unfilled requests do not necessarily correspond with a long turn-around time. Information regarding filled requests, is used to calculate turn-around time. A large number of unfilled requests will eventually have a negative effect on the available time left to handle other requests.

% unfilled requests – GAELIC libraries requesting nationally	Average % unfilled requests	Average Turn- Around time for Books	Average Turn- Around time for Articles
1-19% (9 library sites)	13%	10.1 days	5.6 days
20-29% (16 library sites)	23%	9.3 days	5.3 days
30-39% (7 library sites)	34%	11.1 days	6.1 days
40-61% (6 library sites)	49%	9.7 days	5.7 days

9.2 Library Size And Turn-Around Time

The average turn-around time of the large libraries is not better than that of the medium sized libraries. The average turn-around time of the small libraries seems to

be longer than in the other groupings, even though they have received a higher percentage of documents from GAELIC libraries.

Library Size Large, Medium and Small Libraries	Average Fill rate – documents supplied by national libraries	Average fill rate – documents filled by GAELIC	Average Turn- Around time for Books	Average Turn- Around time for Articles
>1000 requests placed (6 library sites)	77%	58%	9.5 days	5.4 days
300-999 requests placed (14 Library sites)	75%	61%	8.9 days	5.3 days
0-299 requests placed (18 library sites)	66%	68%	10.4 days	5.9 days

9.3 Average Percentage Requests filled by GAELIC libraries and Turn-Around Time

GAELIC libraries are relatively near to each other and research indicates that the turn-around time for books received from GAELIC libraries are better than receiving books from national libraries. The same does not apply to articles. Libraries receiving most of their documents from GAELIC libraries, do not have an advantage above libraries using other suppliers as well.

% Requests filled by GAELIC libraries	Average % requests filled by GAELIC	Average Turn-Around time for Books	Average Turn-Around time for Articles
80-100%	82%	9.7 days	5.6 days
70-79%	74%	9.6 days	4.9 days
60-69%	63%	9.6 days	5 days
19-59%	42%	9 days	6 days
National average for GAELIC libraries		9.8 days	5.2 days

10. VISITS TO LIBRARIES (Annexure 14)

The project team visited several GAELIC libraries in order to meet the IL staff, get familiarized with the circumstances at each site, talk to the staff about their performance, discussed problems and working procedures as well as training needs. . The informal conversations were beneficial to both parties. Problems encountered at the different sites were listed.

11. SABINET ONLINE – ISSUES THAT SHOULD BE ADDRESSED IN ORDER TO ENHANCE INTERLENDING SERVICES

- Revise the list of reasons for unfilled requests – rename and/or delete
- Easier and more accurate way to calculate the turn-around time
- Unfilled reasons – reasons for books and articles separately
- A user-friendly program to retrieve accurate turn-around statistics.
- Loan status of records should be visible on the request form

- Duplicate inscriptions on SACat, or different editions reported separately, should be eliminated. We suggest all editions to be reported under one title with the latest edition up front and the others to follow.

12. RETRIEVAL OF MANAGEMENT INFORMATION

Indicators for library performance are the number of requests handled, the fill rate and the turn-around time and cost effectiveness. An annual interlending report, containing management information covering the above aspects, will enable the library management to detect progress or a decline in the performance of the interlending office. In the latter case causes for the problem should be identified and addressed.

It is advisable to compare the past year's management information with information of the preceding 3-5 years in order to check for trends. GAELIC averages, provided on an annual base, would be beneficial for benchmarking purposes.

A special password is needed to get access to management information on the ReQuest system. If the password is unknown, Sabinet Online can be contacted.

12.1 Total number of requests handled and fill rate

The data needed to calculate the fill rate, can be retrieved from the ReQuest system under SELECT AND PRINT followed by clicking on REPORTS.

In the case of IFLA statistics. Data are available per month or per year.

It is advisable to retrieve data for the annual report of a certain year in January of the following year.

Information regarding the total number of new requests for books and articles, as well as the total number of filled requests for books and articles from both the Requesting and the Supplying point of view can be retrieved. Calculate the total number of requests handled, by adding the totals of books and articles. Calculate the fill rate –

$$\frac{\text{Number of documents received/supplied}}{\text{Number of new requests sent/received}} \times \frac{100}{1} = \text{Fill rate (\%)}$$

12.2 Turn-around time

The current ReQuest system does not make provision for the direct retrieval of information regarding turn-around time. It is however possible to get an indication of the turn-around time if we choose FILL STATISTICS under REPORTS.

The data available under FILL STATISTICS enable us to calculate the minimum number of days needed to fill a request, and not the real number of days as in the previous program. The calculated average turn-around time is thus inaccurate and can only be used as a directive. If South African libraries should feel the need to calculate their turn-around times regularly, SABINET-Online will have to provide a more reliable system to do so.

Data under FILLED REQUESTS is given per month and not per year. It is advisable to calculate the average turn-around time by selecting 3-4 busy months. Calculate the total number of documents for each of the different periods of time and then proceed as indicated below.

Information regarding books (loans) and articles (copies) are provided separately for both the requesting and supplying point of view, thus turn-around time for each activity can be calculated.

The turn-around time on the requesting side indicates the number of days from the time that a request is placed until the requested document is received on the system. On the supplying side it indicates the number of days from receiving a request until the requested document is shipped on the system.

The data are presented in the format as shown in column 1 in the following table -

DATA ON REQUEST	STEPS TO CALCULATE THE AVERAGE TURN-AROUND TIME		
	As the previous number of documents are included in each of the numbers in lines 2-4 in column 1, the real total for each period is calculated by subtracting the previous number (see below)	Multiply the number of documents with the number of days to calculate the total number of days	Divide the total number of days by the total number of books to get the average turn-around time in days to fill a request
Filled stats: Borrower : for 200505			
7 loans filled within 2 days	7 documents received within 2 days	$7 \times 2 = 14$ days	
19 loans filled within 7 days	$19 - 7 = 12$ documents received within 7 days	$12 \times 7 = 84$ days	
20 loans filled within 14 days	$20 - 19 = 1$ document received within 14 days	$1 \times 14 = 14$ days	
22 - - Total loans filled	$22 - 20 = 2$ documents received in <u>more than</u> 14 days	$2 \times 14 = 28$ days <i>As the actual number of days are unknown, we have to work once more with 14 days</i>	Calculate total number of days $14 + 84 + 14 + 28 = 140$ days Total number of documents $7 + 12 + 1 + 2 = 22$ Divide total number of days by total number of documents $140 \div 22 = 6.3$ days Average turn-around time = 6.3 days for loans received
51 copies filled within 1 day			
68 copies filled within 2 days			
96 copies filled within 7 days			
119 - Total copies filled			
Filled stats : Lender : for 200505			
28 loans filled within 2 days	28 loans supplied within 2 days	$2 \times 28 = 56$ days	
30 loans filled within 3 days	$30 - 28 = 2$ loans supplied within 3 days	$2 \times 3 = 6$ days	
30 loans filled within 4 days	$30 - 30 = 0$ loans filled within 4 days		
30 - Total loans filled	$30 - 30 = 0$ loans filled in <u>more than</u> 4 days		$56 + 6 = 62$ days $28 + 2 = 30$ loans filled $62 \div 30 = 2.1$ days turn-around time for loans supplied
474 copies filled within 1 day			
478 copies filled within 32			

days			
500 copies filled within 3 days			
503 copies filled within 4 days			
503 – Total copies filled			

13. CODE OF BEST PRACTICE

Resource sharing is the cornerstone of Interlending, therefore, consideration, consciousness, accuracy and a quick response is necessary to satisfy all users.

The message file enables libraries to communicate and interact with each other. It is essential to check the message file on a daily basis or even several times a day. Please do not send unnecessary messages, especially if the system allows for an action.

Incomplete transactions clutter the system and slow it down. Interlending librarians should strive to move filled requests as soon as possible to a *Complete* status, whilst unfilled requests must either be marked as *Cancel and Retire* or *Lost*

13.1 Borrowing Point of View

Messages from lenders – these messages must be read and responded to, or taken note of. Click on the *Done* button after the message has been read and responded to.

No Renewal & Recalled – contact your own users immediately. These loans have to be returned promptly.

Need by Date has Expired – cancel request or edit and add a new need by date. The request can then be rerouted.

Unfilled – **please** reroute or Cancel & Retire!!! These requests must be attended to on a daily base.

Review from staff or patron – these are the prerequisites or requests that need attention from IL staff. Turn-around time is of utmost importance, thus these requests must be attended to throughout the day.

Overdue – this is to notify the IL staff that loans are overdue and have to be returned or renewed.

Shipped – look occasionally at this field to determine if shipped items have been received physically and on the system, or whether they are still on their way or probably lost.

Will supply – although generally used for reserved books, supplying libraries occasionally use this option for other cases as well. Check these requests regularly to ensure that the need by date is still relevant and whether your users still need the items.

Special statuses – *Lost*: preferably loans lost by you should remain here during the invoicing process or until the book is returned. *Overdue but not yet received books* are listed here and need to be followed up.

13.2 Supplying Point of View

Messages from borrowers – these messages must be read and responded to, or taken note of. Click on the *Done* button when the message has been read and responded to.

Pending on picklist – check this list every morning before printing the new picklists. Attend to requests that have not been printed or responded to the previous day. If not responded to within the set time frame, these requests will expire and reflect negatively on your library's performance.

Renewal request – if a loan can be extended, do so. Maximum loan period is three months.

Will supply – only reserved requests belong here. Some libraries change the status to *will supply* while waiting for documents from branch libraries and then forget about them. Attend to these requests.

- Returned – Check the items on the returned list with the in-house system to pick up books that have been returned but not checked in on ReQuest.
- Recalled – recalled items must be followed up regularly.
- Overdue – follow up and recall if necessary.

Special statuses/lender - preferably only lost books that have been invoiced, should be left here until paid/returned.

13.3 Financial Processes

Print invoices at the beginning of each month and sent through for payment

Check financial reports each month and ask for corrections

Sign correction forms forwarded to you as supplier and fax it to SABINET Online

Attend immediately to invoices sent for lost books

Update free of charge libraries

13.4 Management Information

Retrieve IFLA statistics annually and calculate your fill rate.

Attend to problems resulting in a low fill rate

Calculate your turn-around time and attend to problems that slow you down

13.5 Administration

Update your library's contact information on the address lists of the NLSA and ReQuest

Inform libraries via the list serve of any changes regarding contact numbers or Ariel IP addresses

Inform libraries via the list serve if Ariel workstations are out of order or if libraries are closing for a period of time.

14. TRAINING WORKSHOPS

The need for training workshops was evident when the reasons for unfilled requests were studied and after the site visits to the GAELIC member libraries. During our library visits 50% the Interlending staff indicated that they would like to attend a workshop focusing on common errors, general updating and advanced practices.

It was agreed that, during the workshop, emphasis would be placed on common errors that have been picked up during the analysis of unfilled requests and a code of best

practice for Interlending and Document Supply. In view of the success that can be obtained by making use of industrial theatre, permission was granted to prepare a play to be presented to joint workshops of members of the LIASA ILL Interest Group and GAELIC ILL staff. A scriptwriter/producer and actors from the University of Pretoria were appointed to design a 15 minute play which highlighted the importance of attitude, commitment and training.

The first workshop was a joint LIASA/GAELIC meeting held on 7 September 2005 at the Development Bank, Midrand and was attended by 45 participants. The workshop comprised three parts: and received a very positive response.

- Feedback was given on this research with regard to unfilled requests.
- Cressida Heslop from Sabinet Online presented the training session based on the Code of Best Practice for interlending workers and the problem areas that were detected during the research – the latter was given specific attention.
- Copies of the Code of Best Practice for Interlending Workers were handed to attendees

After the success of the LIASA/GAELIC meeting we have decided to repeat the presentation at the LIASA Conference in order to reach interlending workers from across the country. The workshop content was presented during the LIASA Conference, Interlending Interest Group meeting on 28 September 2005. The workshop attendees were even more responsive than at the previous event. During the training session many questions were asked and answered. Copies of the Code of Best Practice were also distributed.

A 15 minute video recording was made of the industrial play and has been professionally edited to include as part of the final report to be made available on CD-ROM and distributed to the GAELIC Member libraries.

15. CONCLUSION

The reasons for unfilled requests have mainly been speculative, but research confirmed that the assumptions proved to be correct. It is crucial that libraries regularly update SACat and add all their holdings. A sufficient number of well-trained and motivated staff will enhance interlending performance with the outcome being service excellence. The shortage of books, especially on undergraduate level, must be addressed. It must be borne into mind that IL is primarily a service for post-graduates and researchers. Stricter ruling regarding the timely return of books will also make books more available. Accurate and efficient shelving of items that have been returned needs attention, as well as regular shelf reading and shelver training. Although the percentage of unfilled requests on the supplying side is important and must be addressed, it is more important to look at the library's fill rate on the requesting side. Libraries should try to enhance this percentage and if it can be combined with a fast turn-around time, this will really reflect on excellent and outstanding performance.

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