

**Central Access Services
Unit Annual Report FY15
(Circulation, Bookstacks, Interlibrary Loan)**

Submitted by Cherié L. Weible, Head of Central Access Services

I Unit Narrative

Central Access Services is comprised of several sub-units which provide access to materials located on and off campus for our researchers. The sub-units are Main Circulation, Telephone Center, Billing, Bookstacks, Discharging, and Interlibrary Loan and Document Delivery (ILL/DD).

Central Access Services (CAS) continues to reorganize work distribution according to evidence provided by data and statistics collected by the unit. The unit restructuring that has occurred in the past few years continues to work well and provide efficiencies. Each sub-unit has a primary supervisor that reports to the unit head, Cherié Weible. There are four direct reports (Stokes, Duncan, Danner, and Krueger). These sub-units are listed below along with the main supervisor and a very brief description of the activities the sub-unit covers.

Main Circulation, Telephone Center, and Billing (reports to Stokes)

This sub-unit currently has fourteen employees (Becker, Bial, Blankenship, Gouwens, Hartsell, Hayden, Lindstrand, Marcum, J. Miller, L. Miller, Postula, Robinson, van der Graaff, and Weatherspoon) who are responsible for a wide range of activities which support user access to materials.

One of our challenges is for people to understand that although patrons may not be physically present in line to obtain materials there are constant electronic interactions with patrons. Library billing is now fully integrated into the patron services purview of the unit and many staff are trained to assist with the billing processes. This area serves as the Library's collection agency for fines and fees and works with patrons who need to resolve charges on their library account. Staff in this area are highly skilled at working with our most

disgruntled and upset patrons on a daily basis. The supervisor of this area, Richard Stokes, has taken the lead to provide training sessions for the rest of the library for circulation, billing, and patron services. He has also led his unit in developing better ways to keep statistics and provide consistent answers to patron questions.

Bookstacks (reports to Duncan)

This sub-unit currently has two employees (McCafferty and Riegler) who are responsible for the maintenance of the materials housed in the main bookstacks.

This behind-the-scenes group of employees are responsible for all of the shifting, shelving, and transfer processes for the collection. This year, there has been better control with the workflow and the deployment of student staff which has kept a better balance for the materials waiting to be reshelved. The shifting process has enabled departmental libraries to transfer thousands of items into the stacks this summer.

Discharging (reports to Duncan)

The discharging sub-unit has three employees (Lamb, Schmall, Soule) who are primarily responsible for the materials returned at the stacks as well as the I-Share incoming and returned materials. They check the library book drop daily and process incoming I-Share materials that have been unloaded and pre-sorted by the Interlibrary Loan staff.

Interlibrary Loan and Document Delivery

(Lending reports to Krueger; Borrowing reports to Danner)

Patrons affiliated with campus rely on the expertise of the ILL Borrowing office staff (Danner, Lee, Cross) who are all an essential factor in obtaining the more difficult requests. For ILL Lending (Krueger, Stigberg, Crook, Pawlicki, and Galardy) the I-Share system has steadily reduced the number of requests that come in through OCLC within the state, but with

a higher percentage from more distant libraries. There is a downward trend in the numbers of requests for the previous years, but work remains steady and the reduction of staff has been appropriate in relation to the amount of work that the ILL/DD unit processes.

Summary

Staff changes within the unit have provided a number of opportunities to re-think how the unit operates and to re-evaluate long standing processes. Our goals for FY15 were to continue to analyze workflow to streamline our processes and provide for a better patron experience, provide support to departmental libraries for circulation services and for collections housed in the stacks, and to support access to the collection for our local as well as our non-affiliated researchers. These goals were met and the unit is now focused on the five-year goals as outlined below.

Unit Goals for Central Access Services (2012-2017)

- Focus on G.R.E.A.T customer service standards as outlined by the Library
 - Circulation staff have implemented a G.R.E.A.T. taskforce within the unit
- Strive for user-friendly environment in the bookstacks by providing efficient turnaround time for discharging and reshelving of returned materials
 - Bookstacks staff are closely monitoring the balance of student workers needed to keep materials flowing in a timely manner. There was a large improvement in this area in FY15.
- Continue to maintain a clean and orderly collection housed in the bookstacks
 - Bookstacks staff are cleaning shelves as shifting happens.
- Strive to meet turnaround time goals as found in our consortial agreements for CARLI and the CIC
 - ILL is facing a 9% student wage budget cut for FY16 and staff are working to compensate for the loss of work performed by these students
- Cross train all circulation personnel so that they can back up all other Patron Services areas and continue to integrate all areas of Patron Services (Library Telephone Center, Main Circulation Desk, and the Library Billing Office) into a single unit
 - This is an ongoing and productive process across all areas of CAS
- Identify all unit documentation; vet the information for redundancy, relevance and accuracy; transform relevant into useful reference for the Unit; and archive off out of date materials
 - Main circulation is working through their documentation
- Continue to identify records that can be purged and develop more efficient procedures to access these records
 - The billing office is striving to purge all records which are outdated. Permissions have been secured from the state to shred transactions that are older than five years. This is an ongoing weeding process that was not in place in the past, so cleanup continues as more records are identified.
- Continue to develop stat sheets that are more real time and can be reviewed frequently and provide actionable information to staff on most stats that are taken
 - We now have a full two fiscal years of data for the Circulation, Telephone Center and Billing unit of CAS which will assist with decision making
- Work to optimize use of ILLiad software and implement “web circ” to improve patron experience with ILL Borrowing and Main Circulation transactions
 - Progress halted due to start of fall semester

II Statistical Profile

1. Facilities

- Number of hours open to public per week
 - Summer II 2014: 55.5
 - Summer Intersession: 42.5
 - Fall 2014: 83.5
 - Winter Break 14/15: 42.5
 - Spring 2015: 83.5
 - Summer I 2015: 55.5

2. Personnel

FY15 Employees in CAS

<u>Name</u>	<u>Title</u>	<u>Employment Dates</u>
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Cherié Weible	Associate Professor, University Library Head of Central Access Services	February 2000
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Central Circulation, Telephone Center, and Billing

Richard Stokes	Academic Professional	July 2012
Sara Becker	Library Specialist	September 2013
Sarah Bial	Library Specialist	February 2014
Kristen Blankenship	Library Specialist	March 2014
Paul Gouwens	Library Specialist	October 2012
Rand Hartsell	Senior Library Specialist	December 2008
Timothy Hayden	Library Specialist	March 2014
Brian Lindstrand	Library Specialist	November 2011
Alissa Marcum	Library Specialist	June 2013
Joanne Miller	Library Specialist	February 2011
Lisa Miller	Senior Library Specialist	September 1999
Dani Postula	Library Specialist	November 2011
Judith Robinson	Library Specialist (75%)	February 1997
Sally van der Graaff	Library Specialist	March 2015
Fay Weatherspoon	Library Specialist	October 2011

Bookstacks and Discharging

Susie Duncan	Library Operations Associate	September 1990
Sharon Lamb	Library Specialist	August 2006
Kyle McCafferty	Library Specialist	November 2012
Ben Riegler	Library Specialist	January 2013
Mike Soule	Senior Library Specialist	September 1991
Sharon Lamb	Library Assistant	August 2006
Gail Schmall	Library Specialist	December 2014

Student Assistant wage budget for Circulation and Bookstacks operations = \$152,527

ILL Lending Operations

Melanie Krueger	Library Operations Associate	December 1982
Marla Crook	Library Specialist	August 2003
Matthew Galardy	Library Specialist	April 2014
Chris Pawlicki	Library Specialist	October 2013
Gerry Stigberg	Library Assistant	December 1987

ILL Borrowing Operations

Kathy Danner	Library Operations Associate	November 1995
Julia Keener Cross	Library Specialist	April 2014
Lesley Lee	Library Specialist	April 2011
Sarah Harris	Graduate Hourly	June 2014

Student Assistant wage budget for ILL operations = \$116,074

3. User Services

- Gate Count for Main Stacks: 43,832 annual total taken from stats. provided by library as figured from sweeps week
 - 20,264 stacks entrance statistics
- Circulation for Main Stacks:
 - 131,800 charges
 - 168,320 renewals
 - 138,587 discharges
- Reference and information services
 - 2,248 reference (email, telephone, in person); sweeps annual total
 - 1,584 directional; sweeps annual total

4. New titles added = 46,752; total new items = 47,878

Please see additional statistics specific to this unit in the following pages.

Central Access Services Cumulative Stats			
Fiscal Year	2013-2014	2014-2015	
Stat			
Circulation			
Correspondence Emails	16041	12567	
Phone Calls	3880	3766	
Stacks Entrance	21907	20264	
Campus Mail	11131	10890	
Carrel Transactions	195	154	
Notices Processed (email and print)*	183069	177200	
Stacks Orientation	1137	1530	
Hold Room Transactions	55060	49954	
Courtesy Cards, Dept. Cards, Proxies Issued	542	522	
Recalls Placed	829	788	
Locker Incidents	385	334	
Callslips Generated	47215	46974	
Billing Office			
Email/Letters	1538	2311	
Phone Calls	2193	1410	
Walk-Ins	1227	1122	
Patron Account Holds	1128	344	
Billing Transactions	11111	9624	
Claim Returns Received	203	139	
Claim Return Searches	105	91	
Claim Returned/Billed	82	46	

Table 1. Main Circulation statistics. Two year comparison for FY14 and FY15.

ILL/DD FY2015 annual statistics

Overall total Borrowing filled articles = **7,793**
(1,285 in-state; 6,508 out-of-state)
(CIC filled 2,035 articles = 26%)
(CRL filled 47 articles = .6%)

Overall total Borrowing filled loans = **6,306**
(280 in-state; 6,026 out-of-state)
(CIC filled 2,177 loans = 34.5%)
(CRL filled 94 loans = 1.5%)

All Filled Requests = 14,099

Requests submitted = 10,936 Articles
8,179 Loans

Total submitted = 19,115 All Requests

GRAND TOTAL Filled = **14,099 = 74% fill rate**
Canceled 5,016 total; canceled as available from UIU (2,658) or I-Share (256)

I-Share (Incoming) Total Filled = 47,203

Overall total Lending filled articles = **12,620**
(4,368 in-state; 8,252 out-of-state)

Overall total Lending filled loans = **24,842**
(3,580 in-state; 21,262 out-of-state)

Total submitted articles = 19,460
Total submitted loans = 34,190

Total submitted = 53,650 All Requests
Total Filled = 37,462 = **70% fill rate**

I-Share (Outgoing) Total Filled = 45,407