

Introducing Libraries to Online Methods of Interlibrary Loan and Cataloging

**A Report on the 2003 Resource Sharing Pilot Project
to the LiLI Advisory Board**

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TABLE OF CONTENTS

INTRODUCTION	3
OBJECTIVES	3
PARTICIPANTS	4
ACTIVITIES AND METHODS	4
FINDINGS	5
OCLC Web ILL as a Tool for Electronic Interlibrary Loan	5
OCLC CatExpress as a Tool for Cataloging	8
SUMMARY	12
APPENDIX A: COST SAVINGS OF USING CATEXPRESS VERSUS LASERCAT	21
APPENDIX B: SUMMARY OF PARTICIPANT INTERVIEW COMMENTS	13

INTRODUCTION

In December, 2001, the Idaho State Library organized statewide access to the OCLC WorldCat database through FirstSearch. Earlier that year, the Idaho State Library (ISL) made a decision to pursue the OCLC WorldCat database as an interim solution to creating a statewide virtual catalog. (Idaho State Library, Minutes of the Meeting of the LiLI Advisory Board, Meeting of February 20-21, 2001.) The access to WorldCat showed Idaho libraries the vast expanse of information available in libraries all over the world. A result of that knowledge was a question: How can Idaho libraries and their patrons access that information?

At the same time, the Idaho State Library was considering the future of Interlibrary Loan practices as it relates to a statewide network of libraries. Always considering best practices, the LiLI Advisory Board heard a presentation from OCLC representatives Ron Glass and Paul Cappuzzello with options for providing access to interlibrary loan and cataloging services of OCLC for Idaho libraries. (Idaho State Library, Minutes of the Meeting of the LiLI Advisory Board, Meeting of September 5, 2001.) After consideration and discussions during the next year, it was decided to pursue a pilot project with OCLC.

OBJECTIVES

A pilot project introducing a group of libraries to OCLC's Interlibrary Loan system and CatExpress for copy cataloging would accomplish the following objectives:

- Test alternative methods of resource sharing and cataloging to replace manual methods and services, like OCLC's LaserCat, that may be facing discontinuation in the future,
- Understand the time, money and skills needed to effectively implement OCLC resource sharing technology in Idaho libraries, and
- Determine if state-coordinated access to electronic interlibrary loan is an activity the ISL is interested in pursuing.

ISL created a pilot project that commenced in January 2003.

PARTICIPANTS

The participating libraries were chosen based on their:

- willingness to participate in resource sharing activities and data gathering activities,
- geographic location,
- type and size of library,
- ability to send staff to training sessions,
- existing access to OCLC's WorldCat via FirstSearch (provided by ISL),
- access to a computer running Windows95 or higher,
- compliance with ISL's Library Services and Technology Act (LSTA) eligibility criteria,
- existing resource sharing services to customers, and
- rate of acquisition of library materials (OCLC recommends CatExpress to libraries who plan to catalog fewer than 2,000 items annually).

As a result, the following ten libraries were selected to participate in the pilot project:

Bellevue Public Library	Gooding High School Library
Blackfoot Public Library	Homedale Public Library
Boise Basin Library District	Latah County Free Library District
Boise High School Library	Lewiston City Library
Buhl Public Library	Moscow High School Library

ACTIVITIES AND METHODS

Phase I introduced the OCLC's Interlibrary Loan system to a group of libraries, allowing them to borrow items located in the WorldCat database for local use. Once the libraries had experience borrowing within the system, they were encouraged to begin lending.

Phase II introduced CatExpress, a copy cataloging tool that allows libraries to download MARC records to their local systems as well as contribute their library's holdings in the WorldCat database. With holdings represented in WorldCat, ISL staff believed that project participants would find increased opportunities to lend materials to other libraries.

Training accompanied both phases of the project. A combined four days of training included sessions on: searching within the OCLC ILL system, using OCLC Web ILL, introduction to the MARC records, using CatExpress, and basic copy cataloging.

The project activities were evaluated using several methods:

- Workshop participants were provided an opportunity to evaluate training at the conclusion of each session,
- Staff of the project libraries submitted monthly reports of the amount of staff time they spent on project activities,
- OCLC collected statistics automatically on the number of interlibrary loan transactions, cataloging data, and the amount of time project libraries were logged into the system, and

- ISL Networking Consultant, Gina Persichini, met with staff at each of the participating libraries to conduct an evaluative interview consisting of 11 questions (Appendix A) to measure participants' opinions on all aspects of the project.

FINDINGS

OCLC Web ILL as a Tool for Electronic Interlibrary Loan

When asked about methods for borrowing materials through ILL, before being introduced to the OCLC ILL system, the participating libraries used a variety ILL methods. Five of the participating libraries were actively using LaserCat to locate and borrow ILL materials. Users of LaserCat for ILL generally printed the ILL form and mailed it to the lending library. Two of the school libraries relied on the local public library and other nearby libraries to either supply materials or request the items through the public library's ILL procedures. One library, a member of a shared networked consortium, relied primarily on sources within the consortium and used a locally-created database of other lending sources outside their system. Other participants employed a process of searching online library catalogs, then requesting an item by email or fax.

ILL Activity

Participating libraries had access to the OCLC Web ILL system from the time of their initial training, January 27th and 28th, 2003. While their access to the ILL system will remain active through January 2004, the data analyzed for this report covers 10 full months of use, through November 2003. During those 10 months, participating libraries requested 1,340 items through the OCLC ILL system.

Training

Project participants were asked to rate learning to use CatExpress on a scale of 1 (easiest) to 5 (most difficult). The average response was 1.75. Respondents found that once they learned to use the system, it was easy. Still, the school libraries experienced more difficulties in keeping up their skills. Lack of use over Summer breaks and the general low demand for ILLs in the schools resulted in school library staff frustrations with the system. School librarians found themselves having to relearn the system after a time of inactivity. Other participants found the system simple to learn and, more, simple to pass along that knowledge to other staff members.

Staff time

Overwhelmingly, the participating libraries indicated that using the online OCLC ILL system required less staff time. The exception to this is the school libraries. The school libraries shared that they did not use the system as much, and they were spending extra time familiarizing themselves with the system.

Comments about time savings were directly related to searching and library policies. One interviewee stated, “the old way, we had to search one library at a time. Now [we] can search all the available libraries at one time.” An added advantage in time savings involved the actual generation of the ILL request. Before, libraries were creating their own e-mail requests and mailing a paper form. OCLC allows them to, instead, create one request online with multiple lenders in a string. Even more, the manual methods of ILL involved a great deal of staff time to search ILL policies of lending libraries. OCLC includes a direct link to ILL policies so borrowing libraries can determine, upfront, issues relating to fees, material type, or lending periods.

Staff time in generating requests was only part of the time savings. LaserCat users who traditionally sent requests through the US Postal Service, found much faster turnaround of those requests when they were submitted electronically. Patrons received their materials sooner.

Costs

Costs for OCLC ILL activity may be calculated in one of two ways. First, transaction-based, considers the number of searches performed, the number of times holdings information is displayed for an item, and the actual request. With this method, credit is provided for lending items so that lending libraries are not charged for sharing materials, which is the overall desired activity. In contrast, for group or consortia purchases of ILL access, OCLC uses an average rate of \$3.00 per ILL request to estimate ILL costs. Three dollars per transaction is the average cost per request for low-volume ILL activity. A breakdown of fees for Interlibrary Loan can be found in Table 1 below.

ILL Activity (with billing code)	Cost	Credit
SBL0431 ILL NUMERIC / DER SEARCH	\$0.44	
SER0314 ILL KEYWORD SEARCH	\$0.61	
SCN0315 ILL SCAN TITLE	\$0.24	
IDH3581 ILL DISPLAY HOLDINGS	\$0.44	
IDH3611 ILL UL DISPLAY HOLDINGS	\$0.44	
ILL4501 ILL REQUEST	\$0.50	
ILL4502 ILL REQUEST REVIEW	\$0.50	
OTC4561 ILL LENDING CREDIT		\$0.38
Low Volume ILL Per Request	\$3.00	

The project libraries requested a total of 1,041 items during the data reporting period. (See Table 2.) At the transaction-based pricing level, they average \$2.32 per request, less than the OCLC average of \$3.00 each. In looking at the data in Table 2, libraries that were able to achieve an average cost per transaction that is lower than the OCLC estimate of \$3.00 each were generally able to complete transactions with fewer searches per transaction. Notably, the libraries with the higher cost per request used more searches per request.

Disappointing was the low volume of requests from some of the participating libraries. Where Boise High School did perform searches in the ILL system, they did not request any materials. During the evaluation interview, the librarian at Boise High School shared their lack of use, but noted that they used the system to show students how the library extends beyond the school’s walls. Moscow High School also had very little activity. Additionally, although Bellevue Public had only 24 requests during the 10 months, that amount is on target with their reported ILL activity of 25 items borrowed for the year 2002. (2002 Idaho Public Library Statistics)

Table 2: Interlibrary Loan Activity and Costs

2003 January - November Numbers (scroll down for dollars and ratios)	ILL Requests	Transaction Based ILL Costs	Consortia Rate \$3.00 per transaction	Transaction Based Cost per Request	Searches per Request
Bellevue Public Library	24	\$83.96	\$72.00	\$3.50	2.58
Blackfoot Public Library	209	\$454.01	\$627.00	\$2.17	1.61
Boise Basin Library District	208	\$629.60	\$624.00	\$3.03	2.19
Boise High School	0	\$8.17			
Buhl Public Library	113	\$247.83	\$339.00	\$2.19	1.77
Gooding High School Library	87	\$376.51	\$261.00	\$4.33	2.83
Homedale Public Library	324	\$612.59	\$972.00	\$1.89	1.28
Latah County Library District	273	\$517.56	\$819.00	\$1.90	1.36
Lewiston City Library	95	\$161.62	\$285.00	\$1.70	1.26
Moscow High School	7	\$19.52	\$21.00	\$2.79	3.14
Totals	1,340	\$3,111.37		\$2.32	

OCLC CatExpress as a Tool for Cataloging

Prior to being introduced to CatExpress as a copy-cataloging tool, the libraries used a variety of methods to catalog newly acquired materials. Six of the 10 participating libraries were LaserCat users. LaserCat is a CD-ROM utility with a sub-set of the OCLC database reflecting the holdings of libraries in the Pacific Northwest. Full users of LaserCat receive an updated set of the CDs four times each year. Of those six libraries, some received the full set, while others purchased only one update per year. The other four libraries used a Z39.50-based interface to search other libraries' catalogs to either download MARC records directly or use the information to create their own records.

The CatExpress service allows users to access the entire OCLC WorldCat database, which includes the holdings of libraries worldwide. The database is updated daily, versus the quarterly update of LaserCat. CatExpress makes it possible for a library to add its holdings information to a record in the database and download that record directly to the local catalog right away.

Cataloging Activity

As a group, the project libraries added 4,820 items to the WorldCat database during their first 6 months of use. They also deleted their holdings from 406 items, which will help ILL users to avoid requesting materials that are no longer housed at a particular library.

The data for the school libraries presented some questions. At first glance, one will notice that Boise High School added only 96 titles, and Gooding High School added none. During the evaluation interview the Gooding High School Librarian was asked about her experience using CatExpress. Her response was, "Because we have LaserCat, probably haven't used it as much as could have." While the Gooding High School library did not add holdings during the first 6 months of use, it is important to point out that much of that time was during the Summer, when the schools are closed. With that in mind, it is remarkable that the other 2 schools added 96 titles (Boise High School) and 126 titles (Moscow High School). Training on the use of CatExpress was in mid-May, not long before the end of a school year. The data provided in Table 3, covers activity through the end of August 2003, not long after the new year began. As the project libraries have continued access to CatExpress through April 2004, ISL staff will monitor continuing activity to determine results after sustained access to the service.

Training

Training is a key consideration when introducing new technologies. Participants were asked to rate learning to use CatExpress on a scale from 1 (easiest) to 5 (most difficult). With responses falling between 1 and 3, the average response was 2.0. Those surveyed commented that the system was “straight forward,” though it did take some time to get used to it. After a short ramp-up time, they found it to be easy to use.

A particular consideration in training concerned the school libraries. School library staff found that after being away from the system during their annual summer break, they had to relearn some tasks.

Staff time

When asked, eight of the participants indicated that using CatExpress required less staff time to catalog materials. One library thought the time to be “comparable,” and one other thought it took more time to use CatExpress than it took to purchase the MARC records with the items they ordered through the vendor. The libraries that indicated savings in staff time attributed the savings to the time it takes to search for the correct record. Doing so in the larger OCLC database is considerably faster. In addition, participants found that they were able to locate records for newer materials faster than if they would have had to wait for the next issue of the LaserCat CDs.

Costs for Online Cataloging

Libraries opting to use OCLC’s online cataloging services have some pricing options available. They may opt for transaction-based billing or subscribe to the CatExpress service with a group, or consortia, flat rate. One of the pilot project’s desired outcomes was to determine if access to these services is feasible as a state-coordinated project. Should the State Library choose to pursue group access to the service, the consortia rate is the appropriate rate to use for measuring costs. With that in mind, Table 3 on the next page, shows the cataloging activities of the project libraries along with the corresponding costs for both transaction-based pricing and the consortia rate of \$.90 per record for adding holdings in the OCLC system.

The project libraries had access to OCLC’s CatExpress service beginning May 2003. Using 6 months of data, it was found that the 10 libraries added 4,820 items to the OCLC database. Using the transaction-based billing method, the project libraries averaged \$1.48 value per record added. The lowest cost-per-record value for an individual library was \$1.32. Compared to just \$.90 per record, consortia pricing provides a significant savings.

Table 3: Cataloging Activity and Costs

Library	6 Months of Activity						Annual Estimates		
	Searches	Records Exported	Titles Added	Titles Deleted	Actual Value of Activity	Value of Activity		Titles Added	Cost at Consortia Rate (\$.90)
						Transaction pricing	Consortia Rate (\$.90)		
Bellevue Public Library	423	273	259	1	\$ 386.65	\$ 1.49	\$ 233.10	518	\$ 466.20
Blackfoot Public Library	180	125	115	2	\$ 188.06	\$ 1.64	\$ 103.50	230	\$ 207.00
Boise Basin Library District	522	408	392		\$ 618.83	\$ 1.58	\$ 352.80	784	\$ 705.60
Boise High School	924	108	96	329	\$ 337.84	\$ 3.52	\$ 86.40	192	\$ 172.80
Buhl Public Library	1,544	1,114	983	2	\$ 1,424.04	\$ 1.45	\$ 884.70	1,966	\$ 1,769.40
Gooding High School Library	1				\$ 0.44		-	0	-
Homedale Public Library	1,445	1,078	1,068	72	\$ 1,414.55	\$ 1.32	\$ 961.20	2,136	\$ 1,922.40
Latah County Library District	901	634	608		\$ 902.95	\$ 1.49	\$ 547.20	1,216	\$ 1,094.40
Lewiston City Library	2,304	938	1,173		\$ 1,671.71	\$ 1.43	\$ 1,055.70	2,346	\$ 2,111.40
Moscow High School	183	137	126		\$ 171.74	\$ 1.36	\$ 113.40	252	\$ 226.80
Totals	8,427	4,815	4,820	406	\$ 7,116.81	\$ 1.48	\$ 4,338	9,640	\$8,676

LaserCat is another option for copy-cataloging. A number of Idaho libraries utilize LaserCat, and, in fact, 6 of the 10 libraries participating in the project are LaserCat subscribers. Libraries that subscribe to LaserCat have an option to receive updates 1 time, 3 times, or 4 times per year. Using an annual estimate of activities based upon the 6 months of data already collected, a cost comparison (See Table 4) shows that most of the participating libraries would likely see a cost savings when cataloging using the online CatExpress service over subscribing to the LaserCat CDs.

After reviewing the cost savings of CatExpress at a consortia rate of \$.90 over LaserCat (at full subscription with 4 updates per year), it appears that libraries who catalog 1,700 or fewer items annually would benefit from using the online CatExpress service. (See Appendix B.) It is important to note that the figures do not take into account the savings in staff time to complete cataloging activities, as was widely

reported by project participants. Libraries may find that staff time savings to be a key factor to include in choosing copy-cataloging services. The figures also do not make comparison with other OCLC cataloging services available. The CatExpress service is designed for use by libraries cataloging fewer than 2,000 items annually. Libraries with cataloging anything close to or higher than 2,000 items a year should consider all options, including full cataloging privileges in the OCLC system.

Table 4: CatExpress versus LaserCat

Library	CatExpress Online			Savings over LaserCat		
	Estimated Titles Annually	Cost at transaction-based rate	Cost at Consortia Rate (\$.90)	1 issue /yr \$595	3 issues /yr \$1,195	4 issues /yr \$1,595
Bellevue Public Library	518	\$773.30	\$466.20	\$128.80	\$728.80	\$1,128.80
Blackfoot Public Library	230	\$376.12	\$207.00	\$388.00	\$988.00	\$1,388.00
Boise Basin Library District	784	\$1,237.66	\$705.60	(\$110.60)	\$489.40	\$889.40
Boise High School	192	\$675.68	\$172.80	\$422.20	\$1,022.20	\$1,422.20
Buhl Public Library	1,966	\$2,848.08	\$1,769.40	(\$1,174.40)	(\$574.40)	(\$174.40)
Gooding High School Library	-	-	-	-	-	-
Homedale Public Library	2,136	\$2,829.10	\$1,922.40	(\$1,327.40)	(\$727.40)	(\$327.40)
Latah County Library District	1,216	\$1,805.90	\$1,094.40	(\$499.40)	\$100.60	\$500.60
Lewiston City Library	2,346	\$3,343.42	\$2,111.40	(\$1,516.40)	(\$916.40)	(\$516.40)
Moscow High School	252	\$343.48	\$226.80	\$368.20	\$968.20	\$1,368.20

SUMMARY

Between the statistical data gathered and the follow-up interviews with the project participants, the following conclusions were drawn:

- Using the online method of requesting materials through Interlibrary Loan, libraries were able to fill more customer requests for materials.
- Online ILL results in faster service to customers due to less staff time required to process requests and faster communication between lending and borrowing libraries.
- Online copy cataloging through OCLC results in improved cataloging processes due to higher match rates for MARC records versus alternate methods.
- CatExpress allows library staff to spend less time on cataloging activities by shortening the time needed to locate, copy, and create MARC records for their local automated system.
- Idaho library staff can learn to use online ILL and cataloging services with little difficulty.
- School library staff may experience difficulties incorporating new automated applications into their work routine due to the interruptions in their library service and the resulting need to relearn technical procedures after school breaks.

Participants were asked what they had learned as a result of the pilot project. The responses to the question can be found, in full, in Appendix B. Some highlights are included below:

- There is technology out there that facilitates library operations for small libraries. It brings small libraries into the mainstream of library services.
- Bottom line: purpose is to provide service to patrons and this let's you do that more cost effectively.
- Learned that there are other options available that we're maybe not aware of that could really benefit us.
- It has come home how different public library and school library life is in terms of money, services, and everything. Our philosophy is the same, but our approach is very different.
- Networking with all the other libraries was a big advantage of this project.
- Had considered CatExpress before, but couldn't have afforded the training for it, even if they could have gotten the service itself.
- Patrons are happy; they are always amazed at the speed in which they get their materials. Before it took 10 days to 2 weeks to get a request in.
- Affirmed that using technology to perform ILL and cataloging saves time. It has saved staff time.
- There's an easier, faster and better way to do things.

In the end, libraries and their customers were positively affected by the activities of the project. In considering the project objectives, libraries adjusted well to alternative methods of ILL and cataloging, and ISL staff have a better understanding of the costs, time, and skills necessary to implement those methods. As a next step the Idaho State Library and the LiLI Advisory Board will need to determine if they will pursue state-coordinated access to those services in an effort to achieve statewide resource sharing goals.

APPENDIX A: SUMMARY OF PARTICIPANT INTERVIEW COMMENTS

Question 1 Before participating in the Pilot Project, how did your library conduct ILLs?

- Called the public library and asked. Look at online catalogs of other schools in area. Look at LaserCat, then public library would do the request (Agreement with public library to do this and the school donates postage if necessary, but it hasn't been necessary.)
- LaserCat, by mail
- ALA Form by fax or e-mail. Located items by searching catalogs available on the Web. (Lynx, ISL, BSU, etc). Had to search catalogs one by one.
- LaserCat
- LaserCat - Printing forms and mailing them (faxes for rush items)
- Depends on the library they borrowed from. Generally email requests, some were fax.
- LaserCat. Sent printed requests by mail, occasionally by fax or email, particularly if a patron was in a rush. Occasionally, give patron paperwork and let them pick up the material at a nearby library (pre-arranged with the other library).
- Used to use LaserCat/WLN. After it went to OCLC, didn't do much. Just called the public library or other local libraries
- Consortium system. Had local database of other ILL sources outside the consortia and did fax requests.
- WLN/LaserCat. Started to use WorldCat through FirstSearch to identify, then had to find out how a library would accept request. A lot of manual labor, time consuming.

Question 2 Do you find that the OCLC Web ILL takes more or less staff time to complete a transaction?

- Less time. But, had to relearn at the start of the school year. Plus, realized the students aren't checking out a lot of books in general, noticed low circulation statistics at the school library.
- Extremely less time. LaserCat had more steps. Online, the information about the libraries is there right away. Having to use the mail with LaserCat slows things down a lot.
- Less time, because, the old way, we had to search one library at a time. Now can search all the available libraries at one time.
- More staff time. Haven't really used it for borrowing. Library lends more than it borrows in general.
- Less time, because of not having to hand fill-out the forms. Use FirstSearch for searching, finds it is fastest that way.
- Less time, because it's all there in one place. Before, each activity was in a different place (searching, library policies, and the request form/email). I like that the system tracks everything.
- Less staff time. About 2/3 - 3/4 of the time.
- Initially more, but that was learning curve. Also, coming back after summer. Haven't done any ILL since back to school this fall.
- Less time. Get the request; search WorldCat, note OCLC number. Then go to OCLC and search by OCLC #. Not having to generate the email request saves time. In OCLC can create a trail with multiple lenders.
- Less. Totally in love with it. Fast and easy

Question 3 On a scale of 1 - 5, with 1 being the easiest and 5 being the most difficult, how would you rate learning to use the OCLC ILL system? Explain.

- 1 - Borrowing items felt good after the training. Easy to search when you know what you are looking for. But, if you're doing a subject search, it's hard. Had people to ask, but they weren't in immediate local area; not locally accessible. Not using a lot due to low usage stats in the library, so when needed, have to relearn the system.
- 1 - Really easy. The system was very slow, system was "thinking a lot." One staff went to training, came back and trained the others in about an hour.
- 2 - Because she didn't have to "unlearn" anything. OCLC was the first way she learned ILL. Learned from other staff members who were at the first workshop.
- 3 - Because we haven't been using it enough. Lack of practice.
- 2 - Once we started using it, after the training, it wasn't difficult. Had some questions at the start about confusing steps in borrowing, but have worked them out. Easy to use.
- 3 - Not the easiest thing in the world, especially if you don't have significant experience with it.
- 2 - A few things were confusing at first, such as loaning an item to another library, clicking the "update" twice. Confusing for staff.
- 1.5 - Once used to it, it was simple. Had to learn to go back into system to update transaction.
- 2 - Training was confusing. More confusing than the system itself. Easy to transfer the training to another staff member.
- 1 - Learned how to use it in a casual afternoon from the original staff member who attended the training in Boise. (Note: original staff member is no longer employed by library.)

Question 4 How would you describe your experiences using the OCLC ILL system?

- Good. The school library believes sharing resources that way is the best way to run that service in the library.
- Didn't understand the whole system, so had some instances of not noting "return" or "shipped" in the system.
- System worked well.
- Library had to develop a system in house to track things as they had not done that before.
- Mostly positive
- Quicker turnaround for patron
- Fill more requests
- Much less staff time
- Seems fairly user friendly.
- Frustrating to find record that has the most holdings in our region.
- Frustrating to do multiple requests (for book clubs). Not an easy way to do it.
- I'm not sufficient to make a judgment on it.
- Looks good. Seems good.
- It impresses the students and shows them that the library extends beyond its own walls.
- Very good.
- A real time saver. Example: A patron had requested a list of items on a Monday. The library staff submitted the requests on Tuesday. By Thursday, they had some of the items in the library.
- The turn-around is much faster.

- We've been borrowing and lending all over the United States.
- Positive
- Once you get used to the system, it's easy.
- Really like it.
- Good system.
- Grateful we can do searching on FirstSearch rather than in ILL system. Having searched both ways, FirstSearch is the superior search engine.
- Been wonderful to have access to items nationwide, rather than just Northwest like we had with LaserCat
- Fill rate has been higher
- Patrons requests have been filled 2-3 days faster. Patrons and staff pleased with speed at which we can fill request.
- Simple.
- Got timely responses.
- Liked having responses online rather than watching for the mail.
- Love it.
- Library's experience; easy to use.
- Regrettably unaffordable.
- Expensive, but great

Question 5 If money were no object, would you choose to continue using the OCLC ILL system for your library's ILL management? Why or why not?

- Yes. Because of the coverage. It's a well-established system and it works. OCLC has a good reputation with accurate records.
- Yes. Because it saves us money in the long run. Planning to continue using it anyway.
- Yes. You have all the information at your fingertips that's needed.
- Have been able to meet patrons' needs better. Haven't had to decline requests by patrons.
- Yes. It's more worldwide. As I use it more, I find information easier. It's a much bigger database.
- Yes. Time savings for staff. Finding more items using the whole system; greater access to the larger database (than LaserCat). Turnaround is faster
- Yes, most definitely. Ease of use. Drawback: there are other libraries not using it. If more libraries used it, it would be awesome.
- Yes "resounding." Speedier fulfillment of requests. It feels like the number of ILLs increased, but the statistics don't show that. Have also had an increase in additions to collection, might be affecting ILL numbers.
- Yes, because of the access to all the U.S.; the whole database, rather than limiting ourselves to just this area. Really like the ease of mailing things rather than the shuttle service used by the school now.
- Absolutely. It has standard format. Dependable and efficient. State access to FirstSearch WorldCat is important. It makes the ILL system more useable.
- Yes. It's so easy.

Question 6 Before participating in the Pilot Project, what tools did you use to catalog materials?

- When purchasing books, we would purchase the MARC records with it. Download from LaserCat (4x year subscription, shared with local consortium)
- Original catalog creating MARC records. Used FirstSearch to see how others did it, but hand-entered entire record in own system. Sometimes purchases records with new books. Used Library of congress website to see how they cataloged items. Also searched through Follett's Alliance system (Z39.50 database)
- Through Athena's Z-MARC feature. It's built into Athena. It lets you select the catalogs to search. Once a record is found, you download it right into the Athena system, adjust the local information. Don't have to leave Athena at all. Soon will be moving to the Voyager system (Endeavor), and are told that the process should be similar.
- LaserCat
- LaserCat, since 1989. Used LILI-Z to find some MARC records, Winnebago's Z39.50 server to find records from other Winnebago users. Last resort: original cataloging
- Follett (library's automation system) has an interface that lets you search other databases online and download records. Half the time, couldn't find items through the Follett databases.
- CIP from books. Use LaserCat for copy cataloging. Occasionally use websites from large library. Original cataloging. (Library not yet automated.)
- BookWhere mostly.
- First, attach holdings to records in consortium's systems. If not there, then do original cataloging: LaserCat, EZCat, Library of congress, and other library catalogs
- LaserCat. WorldCat to check records (as a resource). Original cataloging.

Question 7 Do you find that the CatExpress system takes more or less staff time to catalog items?

- Comparable
- More time than alliance and purchasing MARC records. Still learning how to make records from CatExpress work most efficiently with Follett system. With local information, having to open the records twice.
- Less time, it's faster. The records are more precise, easy to find. Have to make fewer changes to the records. CatExpress is convenient. Staff catalogs while working at the circulation desk. If in the middle of processing a cataloging record and a patron needs circulation service, right now they have to abandon the record and start all over again later. The CatExpress system lets them multi-task, keeping both windows open at once. Faster to find records; searching is easier, faster.
- Less staff time. Not sure why, really the time is probably pretty close.
- Less time. Especially because we're adding the holding right away. We don't have to take the extra steps to load our holdings (like with LaserCat).
- Less time, way less than Follett. I like how it downloads items and put them right into the system. Still take time to find records, but not as much time as Follett. Success rate in finding records is higher.
- Much less staff time. Have been downloading the records and saving them to floppy disks just in case they can use them one day once they automate.
- Less. Happy with finding what we're looking for. With BookWhere, had to set up certain favorite libraries.

- Less staff time, definitely. Biggest savings in time was with non-book materials. Are able to find more than 95% of records in OCLC database.
- Less. Searching is a big part of the time savings. But, we still have to take 2nd step to add some local data to the records.

Question 8 On a scale of 1 - 5, with 1 being the easiest and 5 being the most difficult, how would you rate learning to use CatExpress?

- 2 - Straight forward; pretty easy
- 2 - Not intuitive, but also not difficult. Have to type things twice, and not sure about which “location” to use. It’s just not intuitive.
- 3 - The training workshop in May was confusing, made it seem harder than it really is. After the workshop, they got help from other library staff (in their library) and figured out the basics. Once the basics are down, it was very easy to learn.
- 2 - We’re still learning it. Found I can’t let myself get distracted by other activities because I’ll get timed out. So, I schedule cataloging at slower times of the day. I like how it loads into SIRS/Mandarin system. Like being able to see the holdings information up front (unlike LaserCat) Being able to delete items easily is great.
- 2 - Training helped, but the training was confusing at first. Once started using it, it was easy. Have used the 800# (Help Desk) a few times.
- 3 - Tricky when you have to do advanced search. System still a little clunky in its search method.
- 2 - As soon as we learned the little tricks it got easier. But, like everything, you have to learn those things before it is “easy.”
- 1 - Once it was set to download records immediately, it was very nice.
- 1 - Didn’t find it difficult at all. Other staff needed more time to get to comfort level due to lack of experience with cataloging.
- 2 - Took time to figure out how to make it work.

Question 9 How would you describe your experience using OCLC’s CatExpress?

- Acceptable.
- Because we have LaserCat, probably haven’t used it as much as could have.
- Haven’t been using it much, but have a lot to catalog in next four months.
- Slow connection, slow system.
- Nice to find the records.
- Like it. Saves time.
- Good experience.
- Needed some outside help to explain it.
- Training was confusing.
- Had fun figure it out.
- 99% hits finding MARC records. Like not having to wait for the next issue (LaserCat).
- Although LaserCat is a little cleaner when working with kids. The students understand it better when I show them who owns an item.
- Very good.

- Easy to use.
- Can add, edit, and download holding fast. It's all there on one machine in one place, like it is one step.
- Membership in LVIS is very helpful. Have been able to get items at no charge they would otherwise have had to pay for.
- Very positive.
- Would be disappointed if I wasn't able to use it anymore.
- Love using CatExpress
- Resource sharing is important to the library. Before we were contributing holding to LaserCat. Compared to that, uploading directly into WorldCat is much quicker and easier with CatExpress.
- We like that our holdings are available to other libraries that day, instead of waiting for the next issue of LaserCat.
- Pleasant
- It's been very easy to use. I'm very comfortable with it.
- Going to miss it when it's gone.
- Would hate to lose it because I could not do original cataloging on something in the amount of time it takes to do all the steps involved with CatExpress.
- This is true particularly with non-books and some non fiction books.
- Successful with cataloging serials, too. Able to find records.
- Very positive

Question 10 If money were no object, would you choose to continue using the OCLC CatExpress system? Why or why not?

- Yes, because of the currency of the database
- If free, yes, we'd use it when we can't find items in the Alliance system. Definitely would use it for A/V items, which generally can't be found in Alliance.
- Yes. Because it's easy and fast.
- Yes. Already thinking of it, even with the cost, for the district.
- Yes. Easy to use. Saves time cataloging. Can download records right there without other steps like LaserCat.
- Yes, because it's fast, relatively reliable, and we have a good success rate to find what we're looking for.
- Yes. Because of the speed and ease of use and immediate availability of records
- Yes, because it's so easy. Doesn't have cumbersome hoops to jump through. Searching is easy. Have found everything in it so far.
- 100% yes, for the reasons stated above. Think that in the long run, it frees up staff time to do other activities. Allowed me to spend more time on reference. I like the same day downloads.
- Definitely. All the records are there. Ease of use. New stuff is there. Immediacy of it

Question 11 Overall, what have you learned as a result of participating in the Pilot Project?

- I learned that I don't have to be alone.
- A system is set up, I don't have to create it, just be a part of it.
- There is technology out there that facilitates library operations for small libraries. It brings small libraries into the mainstream of library services.

- You can move from an old way of doing things and move to a new way saving a tremendous amount of time.
- Bottom line: purpose is to provide service to patrons and this lets you do that more cost effectively.
- This project provided us the opportunity to experiment with a new way of doing things that we could not have afforded to experiment with otherwise.
- Learned that there are other options available that we're maybe not aware of that could really benefit us.
- Learned that sometimes things avoided because of fear of change, find out it's okay.
- Accessibility has been cool. Benefits to patrons; they don't realize it, but we've been able to fill their needs more. Especially to get technology information for them. The ability to get technical information from technology universities.
- The ability to see loan policies online, right away. The old way you didn't know the loan policy until they turned you down, returned your fax because they don't accept requests that way, etc.
- It's easy. You know when a book has been sent or received. We like having the history of a transaction available. Easy to request extensions, which wasn't an option before.
- When the system is down (CatExpress), it's difficult to get work done. And, the library isn't receiving the notices of when downtime will happen (if it's planned).
- It has come home how different public library and school library life is in terms of money, services, and everything. Our philosophy is the same, but our approach is very different.
- Networking with all the other libraries was a big advantage of this project.
- Before, would have said how different the schools involved (Moscow High School, Gooding High School, and Boise High) are, but found a lot of similarities among the 3 schools.
- Access to the OCLC Help Desk has been good. Really like the access to another person. Get real information answers, like the collegial way of the Help Desk staff, having a real person to discuss things with.
- There are better ways to do things
- Using online methods is a much faster and easier way.
- Good experience
- Glad to have the opportunity to participate.
- Had considered CatExpress before, but couldn't have afforded the training for it, even if they could have gotten the service itself.
- Patrons are happy; they are always amazed at the speed in which they get their materials. Before it took 10 days to 2 weeks to get a request in.
- Learned how to use both systems, I didn't know either one before.
- Learned more about how MARC records work.
- Learned that technology can really work well.
- There are dozens of generous libraries willing to loan items to us
- I want to do ILL. Need to promote it in the school
- Made connections around the state.
- Have been networking with the other schools in the pilot project more as a result of the project.
- Wish I had kept records better for the project.
- Have used FirstSearch a little more as a result.
- It changed my concept of what OCLC is. Was not previously a fan because there was a time when there wasn't enough quality control and I am pleased with the current quality control and the accuracy of the records.
- Increased our efficiency and provided time to do other things.

- Affirmed that using technology to perform ILL and cataloging saves time. It has saved staff time.
- ILL system has been consistent in its usability and reliability.
- Training was a benefit to the project. Couldn't say it was "easy" without that training.
- There's an easier, faster and better way to do things.
- The money/costs makes a big difference
- Having a live system to facilitate the communication necessary makes for more efficient service.

APPENDIX B: COST SAVINGS OF USING CATEXPRESS VERSUS LASERCAT

Number of Records	Cost at Consortia Rate (\$.90)	Savings over LaserCat		
		1 issue/yr (\$595)	3 issues/yr (\$1,195)	4 issues/yr (\$1,595)
100	\$ 90.00	\$ 505.00	\$ 1,105.00	\$ 1,505.00
200	\$ 180.00	\$ 415.00	\$ 1,015.00	\$ 1,415.00
300	\$ 270.00	\$ 325.00	\$ 925.00	\$ 1,325.00
400	\$ 360.00	\$ 235.00	\$ 835.00	\$ 1,235.00
500	\$ 450.00	\$ 145.00	\$ 745.00	\$ 1,145.00
600	\$ 540.00	\$ 55.00	\$ 655.00	\$ 1,055.00
700	\$ 630.00	\$ (35.00)	\$ 565.00	\$ 965.00
800	\$ 720.00	\$ (125.00)	\$ 475.00	\$ 875.00
900	\$ 810.00	\$ (215.00)	\$ 385.00	\$ 785.00
1000	\$ 900.00	\$ (305.00)	\$ 295.00	\$ 695.00
1100	\$ 990.00	\$ (395.00)	\$ 205.00	\$ 605.00
1200	\$ 1,080.00	\$ (485.00)	\$ 115.00	\$ 515.00
1300	\$ 1,170.00	\$ (575.00)	\$ 25.00	\$ 425.00
1400	\$ 1,260.00	\$ (665.00)	\$ (65.00)	\$ 335.00
1500	\$ 1,350.00	\$ (755.00)	\$ (155.00)	\$ 245.00
1600	\$ 1,440.00	\$ (845.00)	\$ (245.00)	\$ 155.00
1700	\$ 1,530.00	\$ (935.00)	\$ (335.00)	\$ 65.00
1800	\$ 1,620.00	\$ (1,025.00)	\$ (425.00)	\$ (25.00)
1900	\$ 1,710.00	\$ (1,115.00)	\$ (515.00)	\$ (115.00)
2000	\$ 1,800.00	\$ (1,205.00)	\$ (605.00)	\$ (205.00)
2100	\$ 1,890.00	\$ (1,295.00)	\$ (695.00)	\$ (295.00)
2200	\$ 1,980.00	\$ (1,385.00)	\$ (785.00)	\$ (385.00)