Quick Facts - Patron Initiated VDX Pilot Project

1. **FACT: Nearly ½ hour of library staff time may be saved for every patron initiated ILL request, depending on category settings and patron notification method**.
   a) 18.30 minutes - for every Manual Authorized category patron request
   b) 20.03 minutes - for every Auto Authorized category patron request
   c) 27.53 minutes - for every Auto Authorized category patron request
                                     AND patron notification by email is utilized

2. **FACT: The less staff intervention on patron initiated requests, the better.**
   There is a strong argument for assigning patrons the Auto-Authorized Category and eliminating staff intervention.   Why would staff find it necessary to review patron issued requests before they enter VDX?

   a) Staff want to review Manual Authorized Patron category requests to check that the title is not locally held before an interloan request is issued.

      ALTERNATIVE: Allow Auto-Authorized Patron category setting in patron's user record and activate VDX "Trap Locally Held" feature. VDX will then collect any request with the library's own location symbol in the request rota and assign "Check Manual" status for operator review.

   b) Staff want to review Manual Authorized Patron category requests to check that patron is not issuing too many requests, causing too many ILL items arriving at one time.

      ALTERNATIVE: Allow Auto-Authorized Patron category setting in patron's user record and activate VDX "Patron Limit" feature. VDX will then collect surplus requests over the established daily limit and assign "Check Manual" status for operator review.

3. **FACT: Library staff effort training patrons is quickly recovered.**
   Based on best case scenario in 1(c) above where a single patron initiated request saves staff 27.5 minutes, staff time spent training patrons to use VDX is recovered as follows:

   a) 30 minutes spent by library staff on one-on-one patron training
      is 92% redeemed on the first request that patron initiates and 218% redeemed by the 5th request that patron initiates.

   b) 60 minutes spent by library staff conducting a group patron training session is 46% redeemed on the first patron initiated and 92% recovered when the second patron initiated request hits the system.

4. **FACT: The training program developed for patrons was appropriate.**
   The post pilot patron exit interview confirmed that 76% found the training provided "just right" and 18% found it more than adequate. 94% found the guide developed for home use to be "just right".

5. **FACT: Patron is likely to receive the item quicker if they initiate their own request**.

   a) When a patron is assigned Auto-Authorized category, the requests they submit enter the system without delay and could be getting attention from the first potential lending library within minutes of entering the system. Depending on time of day the patron submits requests (i.e. during normal work week business hours versus evening or weekend) it is feasible that a lending library could be preparing the item for shipping within the hour.

   b) When staff at a centralized location enter requests on behalf of a patron there is a delay before the request enters the system and can receive attention from potential lenders.

      - If ILL request transfer method to centralized ILL location is by email or fax a requests entry into VDX may be delayed by staff handling an average .57 days with high of 3.37 days and low of 15 minutes. The incidence of a low of 15 minutes was not typical in pilot measurement logs.

6. **FACT: ILL statistics may increase but staff workload stays relatively the same.** Patrons issue more requests, at least initially, with the novelty of placing requests from home any time, day or night. You can activate a "Patron Limit" feature to alleviate too many ILL items arriving within a time frame. Staff at pilot libraries did not experience a large shift in their workload up or down. They were receiving and returning more ILL items (with the bonus of increased statistics) but patrons do at least half the work in an ILL request life cycle outweighing the increased volume.

7. **FACT: Patron initiated VDX Interloan is not suitable for every patron.**

   a) Confirm with the patron that their home computer and browser specifications meet the prerequisite requirements so they have a positive experience. Some of the frustrations expressed in the patron exit interview survey pertain to the capacity of the patron's internet connection and browser which are not a fault of the VDX patron interface software.

   b) The more the patron uses the library and ILL services the happier they will be with patron initiated ILL. The post pilot patron exit interview confirmed that 94% visited the library 2-4 times a month and 71% requested 24-50 interloan items annually. It stands to reason that staff time expended in training a patron is best spent on patrons that utilize the Interloan service frequently.