

Good morning. Welcome to our presentation “Going the Extra Mile: Issues in Resource Sharing for Distance Education Students,” sponsored by the CARLI I-Share Resource Sharing Team. My name is Dallas Long. I’m the Head of Access Services at Illinois State University in Bloomington-Normal, and I’m the chair of the I-Share Resource Sharing Team. I will be your presenter this morning. Joining me is Peggy Glatthaar, from Central Access Services at the University of Illinois at Urbana-Champaign. Peggy will be working behind the scenes helping me navigate the technology and assisting me with answering questions that you might have.

The first thing I’d like to do today is to provide an orientation to the WIMBA technology and ensure that we’re all able to follow along and participate. This is the first time that Peggy and I have given a presentation using the WIMBA technology, so we’re all learning together today. Please do not hesitate to ask for assistance. CARLI staffs are also on hand to help.

[Navigation of WIMBA blah blah blah]

The purpose of today’s presentation is principally to gain an understanding of what issues are presented to us as Resource Sharing staff when we serve the needs of students who do not physically come to the library to pick up materials. We hope that what you will take away from the presentation is a **set of practices to guide you as your library makes decisions** on how to best serve the needs of your students.

So, I think a good place to start is by identifying who distance education students are, and why do we need to treat their requests differently than our traditional, on-campus students.

I think we have **three different kinds of students** who warrant special attention and pose somewhat different issues to us as resource sharing professionals. We have **distance education students, who are formally enrolled in online classes**. They may be an hour away from your library, or they may be in another state entirely. They may not be able to physically come to the bricks-and-mortar library because of geographical distance.

Our second category of distance education students are those whom Peggy and I are thinking of as **“hybrid” students – students who attend classes at your campus and use the physical library but might be enrolled in one or more online classes**.

Our third category of students is the category that I think of as **“dissertating students.” These are the students who are not enrolled in any kind of online program or class, are no longer present on campus**, but still require our assistance with resource sharing. In my experience, these students are most commonly graduate students who are done with their coursework and are writing their thesis or dissertation in another geographic location. For instance, they may be writing their dissertation while participating in an archaeological dig in New Mexico. At Illinois State University, they are still active graduate students and are enrolled in dissertation credit hours. As active students, they are still entitled to all the rights and privileges of the library like any other current student.

Each of these groups of students presents different challenges to us in terms of how we identify their requests for materials, how we circulate and deliver their requested materials, and even what level of

service we might offer them. How many “extra miles” are we willing to go for each group of students, so to speak.

Let’s talk first about our distance education students who are wholly enrolled in online programs and may rarely, if ever, set foot on campus. They probably present the greatest number and most complex issues to us, both in circulation and in interlibrary loan services. Many distance education students prefer to use electronic or online sources for their research, which seems a natural fit with their online learning environment, but they still have a need for physical books and print journals that we hold in our library or must borrow from another institution.

The first question we need to ask is **how are we communicating with these students?** There seem to be three ways that libraries are managing communication and requests for resource sharing from distance ed students.

I surveyed a number of I-Share libraries recently on how they manage relationships with their distance education students. Many smaller libraries responded that the Resource Sharing staff learns who their distance ed students are through e-mail or telephone contact initiated by the students. When the students place requests via the online catalog for locally owned or ILL items, the Resource Sharing staff checks the name of the patron against a list of distance education students. If they find the name, the staff knows to treat the request differently than they would for an on-campus student. The list may be supplied to the Resource Sharing staff by an academic program coordinator or the registrar or compiled as distance ed students contact the library on their own.

For some institutions, the Resource Sharing staff may not be directly managing requests from distance ed students at all. A Distance Education Services Librarian may be the student’s primary contact person. As part of their responsibilities, this Librarian may be receiving and filling the students’ requests for materials independently of the Resource Sharing staff.

However, for many of us, we do not have a librarian dedicated to serving our distance education students and yet we’re simply too large to have personal contact with our distance education students. So, how do we identify incoming requests from our distance education students? Most of them are probably placing requests via the OPAC for our locally held materials, or they are placing ILL requests via ILLiad. How do we know to not put their holds behind the Circulation Desk and wait for the student will never come?

I know that some distance ed write a note in their request indicating they are distance ed students and cannot come to the library to pick up their requested materials. However I do not recommend this practice; when a callslip is not filled and is promoted to another location at your library or to another library, the note in the request can be sometimes lost. If the note is lost, you may have no way of knowing that this student will not be able to come to the Circulation Desk to pick up the item when it finally becomes available for them.

So, the simplest and most efficient answer, I think, is that such students should have a **patron type that distinguishes them as distance ed students**. This way their requests are easily identified by a patron type appears on the callslip itself.

Organizing distance education students into their own patron type involves **assistance from your registrar and from your systems people**. Hopefully, your distance education programs have an academic code that sets the programs apart from traditional, on-campus programs. Your registrar and your systems person can work with you to assign a patron type to these students and organize their entry into your patron loads.

So now you have the student's request. **But where is this student geographically located?** That might make a huge difference in how you are able to circulate materials to this student. For instance, the University of Illinois at Urbana-Champaign will not allow its materials to be taken outside of the state. This does not pose a problem if the student is located in the Quad Cities, but if the student is in Florida, what do you do?

So an important part of serving our distance ed students effectively is **knowing what local policies** exist at your institution or what state laws might govern how and where you can send your materials. Perhaps you will need to develop your services around such restrictions, or perhaps you can re-examine the rationale behind local policies and adopt them to better serving all of your students.

If you are an institution that is unable to circulate materials outside of Illinois, you should consider **"contractual borrowing."** This is where a library enters into a contract to allow another institution's students full access to print collections. Illinois State University has a contractual borrowing arrangement with Lincoln College. Lincoln students are able to visit our library and borrow materials from us just as if they were our own students. Lincoln College supplies us with student data each semester, and we run a separate patron load in Voyager to enter their students into our database. Lincoln students have their own patron type in our system, and we're able to circulate materials to them very easily using their Lincoln student ID cards. In exchange for access to our collections, Lincoln College pays a fee that is negotiated between the two colleges and may be adjusted based on the number of enrolled Lincoln students and their usage statistics.

A significant drawback to contractual borrowing is that it is helpful only if you have a group of students who are in the same geographic area, who are near a library whose collections meet the students' research needs, and you're reasonably certain that you will continue to have a number of students in that geographic area for a sustained period of time. Contractual borrowing will be most helpful for students who might be working at a cohort level at an extension or satellite campus of your institution.

But for many of us, distance education students enrolled in wholly online programs are going to be geographically scattered. You won't want to enter into a contract with a library in Rapid City, South Dakota if you have only one student living in that area, and after that student graduates, who knows how long it might be before you have another student living in that area.

### **So what do you do if you don't ship materials at all?**

If your library is unable to ship materials to distance education students, you will have to work with the students to identify ways of borrowing your materials and ILL materials.

If the student resides near another I-Share library, this is not a huge problem. Help the student identify which I-Share library is closest to where they are living. The student can place a request for your items or another I-Share library item's through the I-Share catalog. They will need to remember to select the closest I-Share library as their pick-up location. You will probably need to walk them through the process the first time they place a request. However this is not entirely fail safe. Once the item has arrived at their pick-up location, the patron will need to go in person to charge out their items. If your library has not set up your distance education students with patron records in Voyager, or they don't have a physical student ID with a library account number, the other I-Share library is probably not going to be able to charge materials out to them.

**What about ILL materials?** These are materials that your patron borrows from libraries outside of I-Share. The ALA Interlibrary Loan Code prohibits the sending of borrowed materials to third party addresses. (**Show ALA ILL Code**) Technically, we shouldn't be sending ILL materials to, say, a student's house in South Dakota, especially if the borrowing library isn't aware of it. So what I recommend to our distance education students at Illinois State University is that they should go to their local public library and submit requests for materials through the public library's ILL office.

Unfortunately, this has drawbacks. Philosophically, we should not be adding extra layers to the student's attempt to borrow materials for their studies. We should be able to help out in a better way. Secondly, many public libraries – especially small public libraries – simply do not have the resources or the staff for sophisticated ILL operations. Many public libraries refuse to fill requests if the cost to the library will be more than \$5, or they charge the cost of the ILL back to the student.

Even asking the student to borrow your own materials or I-Share materials may pose difficulties to some students. Despite sixty-odd libraries participating in CARLI, there are still some areas of Illinois where a student does not live within reasonable commuting distance of an I-Share library.

### **Shipping Materials**

So, shipping materials on behalf of the student seems like the most efficient option and the best way to provide service to your students without making *them* go "the extra mile."

You can ship materials using US Postal Service, DHL, FedEx or another shipping company. It will be up to you to determine which company will offer the best price, but you will want to use a company that

provides tracking numbers to the shipments you send. This is important, because shipping without a way to track the shipment means that the student can easily argue that they never received the books at all. Ideally, both you and the student have access to the tracking number and can see exactly where the shipment is at all times in the shipping process.

You might consider sending return packaging material along with the shipment to make returns easier for your students. In the age of Netflix, where consumers return their DVDs in the same package they received it, this is a great way of ensuring that your materials are actually returned to you!

Of course all of this costs money. You will have to figure out who is ultimately bearing the cost – is this service something your library is willing to absorb? Or are you charging the costs of shipping back to the student? Or is the student already paying for such services through a special library fee charged to students enrolled in distance education programs?

One issue to consider when shipping materials to distance education students is the length of time it will take for the student to receive the delivery and for you to receive it when they send the item back. With most shipping firms, delivery and return will each take a couple days at most, perhaps as long as a week. Since you are charging the item out to the student, their loan period begins before you've even packaged the item. The student might lose significant time on their borrowing period as they wait for the item, and again the item might become overdue in the time it takes for the item to be returned to you. They deserve the same amount of time to use the materials as a student who picked up the item at the library. I recommend that you modify the due date and add perhaps 3-7 extra days to the loan period, to allow the student the use of the material for its regular loan period plus guard against the inevitable delay in shipping and receiving.

Briefly, I want to touch upon two other categories of students who are related to distance education students.

The **hybrid student** is the student who primarily takes classes on campus, but takes one or more courses online. Arguably, this student is a distance education student, and I've had such students plead to me that they should be entitled to having materials delivered to them, just like their peers who are fully enrolled in distance education classes and never set foot on campus.

Personally, I do not agree with this. I go by their program code. If the registrar's office has them coded as a student who is a traditional, on-campus student, then they must come to the library to pick-up their materials.

I am more lenient towards the dissertating student. As I mentioned, the dissertating student is not enrolled in an online class, but has completed coursework towards their degree and is now writing their thesis or dissertation in another geographic location. Unlike distance ed students, I find that dissertating students have very strong needs for print materials. Often, they are graduate students in the humanities and social sciences, whose dissertation research takes a very long time in the field, and they are often in disciplines that still rely more heavily on monographs than on journals. As a consequence, I field a lot of demand from dissertating students regarding their resource sharing needs.

If you do not ship library materials at all, you can again recommend to the dissertating student that they request materials through the ILL services at a local public library. However I have found that many dissertating students are unable to borrow through nearby public libraries, especially if the student isn't considered a legal resident of that library's district. Also, the dissertating student is often ordering large numbers of books at once, which often goes beyond what the local public library is willing to borrow.

As a library with a large student body, I'm not really able to keep track of dissertating students easily and know whose requests to treat differently, nor am I able to absorb the cost of shipping materials to them when they are not formally enrolled in an actual distance education program. However an acceptable work-around is the wonderful proxy patron functionality in Voyager. I ask dissertating students to designate a trusted friend who is still enrolled at the institution as a proxy. We place the dissertating students' requests for our books, I-Share books, and ILL books on the hold shelf like we would for any other on-campus student. The proxy charges out the materials on the dissertating student's library account, and the proxy is responsible for sending the materials to the dissertating student using whatever shipping method they wish. The dissertating student is responsible for bearing the cost of the shipping and return of the materials, and for returning the materials on time. In the absence of a trusted friend to designate as a proxy, the subject librarians have been asked to be proxies for dissertating students and send materials to them.

One final thing... a new standard was released in October 2008 detailing the level of support that libraries which offer distance education programs should be offering to their distance education students. The standards were developed by a committee at ACRL. **"Standards for Distance Learning Library Services" C & RL News, Oct 09, p. 558.**

So that pretty much wraps up the information that we have to give you today. The powerpoint presentation is available for people who would like a copy of it. Please let me or Peggy know your e-mail address, and we'll be sure to send it to you. Does anyone have any last questions or issues that that they'd like to discuss?

Thank you, and have a great day!