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GIST Implementation at St. John Fisher College

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GIST Implementation at St. John Fisher College

Abstract

St. John Fisher College's Lavery Library implemented GIST (Getting It System Toolkit) with the intention of integrating Purchase on Demand into the Interlibrary Loan process. This strategy was chosen to make the request submission process remain seamless for Lavery patrons while improving our collection through patron-driven acquisitions. Leveraging the power of ILLiad, combined with GIST, we were able to change perceptions about collection development and allow our users to guide the growth of our collection at their curricular, research, or leisure point of need. Since the initial setup, Lavery has increased the number of items provided to our patrons through ILLiad requests by an average of 22% a year. Our approach continues to be customer driven by focusing efforts on communication between all parties involved, including multiple departments and the patrons themselves. GIST complements this process by allowing us to customize the information gathered, which influences Library decision making and service quality to our patrons.

Disciplines

Library and Information Science

Comments

Chapter from *Building Responsive Library Collections with the Getting It System Toolkit*.

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Chapter 4:

GIST Implementation at St. John Fisher College

By Kate Ross, St. John Fisher College, and Micquel Little, Monroe Community College, formerly St. John Fisher College

Subject

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Background

Lavery Library first implemented GIST in 2009 with the following philosophy: Use GIST to leverage the power of ILLiad to expand input into purchase requests while taking advantage of our simplified Collection Development and Acquisitions processes. GIST implementation coincided with a time of change at Lavery Library. On the heels of Lavery's new membership in the IDS Project, Interlibrary Loan requests were increasing, and library trends nationwide began illustrating the benefits of encouraging faculty, students, and staff to submit library materials purchase requests. Changes in staff and reorganization of departments led to increased collaboration at Lavery as well.

Our implementation began with investigating the GIST development team's proposed workflow. This workflow seemed more complex than Lavery staff desired, so we decided to learn more about best practices for Lavery while moving forward with the implementation of GIST and purchase on demand. Acquisition decisions using GIST were originally centralized through one person within the library. We began with our director piloting this project. At that time, Lavery's director already had experience using the ILLiad client software, so the learning curve was not as steep. In addition, the director's more developed knowledge of the curriculum enabled centralized decision making. It may seem unusual to begin a purchase on demand program with the director in the driver's seat, but doing so at Lavery left the Acquisitions Librarian free to learn how to use ILLiad and examine the processes for continuous quality improvement. Purchase on demand decisions were made within ILLiad at the point of patrons' submitting their Interlibrary Loan book requests. If a loan request was to be

purchased rather than borrowed, the information was sent to the Acquisitions department through an email within ILLiad and the request itself was marked as “finished” within the ILLiad workflow. The Technical Services department (an umbrella for both Acquisitions and Cataloging) purchased, received, and cataloged the item. The patron was then notified that their request was available, just as they would have been if the book were borrowed. The process was minimalistic and simple.

Analysis

GIST implementation at Lavery began with a trial and error approach, heavily relying on instincts and flexible improvements. Reflecting on this now, our instincts turned out to be correct: eliminate as many layers as possible from the decision making process and centralize the contact points for all loan requests.

Once the benefits of expanding purchase on demand into existing purchasing workflows were realized, streamlining the purchase on demand process would continue over the next three years. By this point, Lavery’s Acquisitions Librarian had a more developed sense of the print collection’s strengths and weaknesses and took over the decision making process. The Acquisitions department expanded the use of GIST into the general workflow of ILLiad loan request processing.

Our original goal for implementing the GIST software at Lavery was simply to purchase as many loan requests as met our collection development criteria for purchase. It was our expectation these purchases would generate at least one circulation, which, it could be argued, was better than the more likely zero circulation that the majority of our collection was receiving. This was the approach taken in the initial first year of implementation. During GIST’s second year at Lavery, a more careful consideration of the titles being requested was taken and, over time, our goals have been modified to:

- Provide patrons access to what they need, whether it’s appropriate to add the title to our collection or borrow it through Interlibrary Loan.
- Communicate with patrons for a good customer service experience to get the best use of library resources.

Using GIST helps us accomplish these goals while taking advantage of our current workflow. More importantly, it also allows us to capitalize on the purchase on demand model without sacrificing our desire to maintain great customer service. Historically, there has been a tension between what users request and titles determined by librarians to be of “value.” However, if you know your population and curriculum, your collection development policy can help you fit patrons’ actual needs into your purchase decisions; GIST streamlines this process each step of the way. Lavery has learned to leverage the power of ILLiad to simplify Collection Development and Acquisitions processes, while changing perceptions about allowing our users to help develop our collection at their curricular, research, or leisure point of need.

Lavery’s workflow begins with analyzing the information patrons provide within the GIST interface on the Interlibrary Loan request forms. The data gathered during request submission are coupled with ILLiad’s additional functionality, enabling the completion of the decision making process. The information received helps to inform our decision about whether to add the item to the collection or borrow it. The Acquisitions Librarian evaluates each loan request as a collection development decision. Lavery’s priority for deciding what to purchase is not first and foremost about saving money. Each request is evaluated based on the following criteria, in this order: is the request from a faculty member or student? Does the request support a particular course or curriculum? Is it easily available for purchase? The ultimate decision is the result of art, not science, as we have no one-size-fits-all approach. For now, we employ a less-likely to more-likely-to-purchase gradation. While parts of this process can be automated, for example, only reviewing faculty requests, the Acquisitions Librarian is reluctant to do this until request volumes make it absolutely necessary. Using past years’ experience of purchasing, we prefer to review each request and recognize its potential to benefit our collection.

Additionally, the GIST software itself brings together helpful tools under the ILLiad umbrella that allow the decision maker to determine whether an item is already owned (Lavery's policy does not include duplication), of value to a college collection (as checked against Resources for College Libraries), a textbook (Lavery's policy states we don't purchase required texts), or freely available as an eBook (via HathiTrust or Google Books). All of these tasks are accomplished using separate resources, but ILLiad brings them all together at your fingertips within each request through its add-on feature. Once a decision about the selection is made to purchase or borrow, ILLiad add-ons can be used to further investigate whether purchasing is still a viable option. In Lavery's workflow, the Acquisitions Librarian determines whether an item is available in stock at Amazon (Lavery enjoys free two-day shipping with our Prime subscription) or available to Rush from YBP Library Service's GOBI3 ordering system. The information provided on the user side combines with the add-ons in the GIST tab to enable the Acquisitions Librarian to quickly decide whether to purchase or borrow. Lavery Library's collaborative approach to GIST requests, with both Acquisitions and Interlibrary Loan departments involved, means requests flow seamlessly for the patron between purchase, borrow, and sometimes back to purchase for additional review if the item is not available to be loaned.

Over time, we began to see that customization of GIST was an important piece of our relentless pursuit of excellent customer service. As mentioned before, feedback and communication from the patrons is so valuable during the Collection Development process. The ability to gather more information from the patrons about their request helps to place the item along the decision continuum. Being able to add/remove GIST fields on the patron request form has enabled us to truly make GIST work for our local purposes.

GIST within ILLiad also enables the features of the software to be utilized and added to the quality customer service experience. Using ILLiad to manage and track communication between Acquisitions and patrons, Acquisitions and the Access Services department, Access Services and the patrons, etc., makes it easy to request more information, send follow-up emails, send informational emails, and more during the fulfillment process. Effective communication with patrons does add layers of complexity, but the impact is minimal, as only a small percentage of requests requires more than one communication to make thoughtful collection development decisions. Lavery Library is committed to the idea that its people are its best resource. Therefore, this personal level of feedback regarding a small percentage of requests is not considered inconvenient or unnecessary; rather, we are reinforcing the belief that personal attention is best for our patrons. Our GIST procedure is simply an extension of this personalized attention.

In April 2012, as we increased the extent to which we were communicating with patrons regarding their requests, we were curious about patrons' level of satisfaction with this initiative. We created a short survey and added the link to the notification email patrons receive when we have decided to buy their request instead of borrow. The survey asks, "Regarding your request, how satisfied are you with the communication you received after you submitted the Interlibrary Loan request?" To date we have received 35 results. The results are overwhelmingly positive, with nearly 83% responding that they are Very Satisfied (on a scale of 1-5).

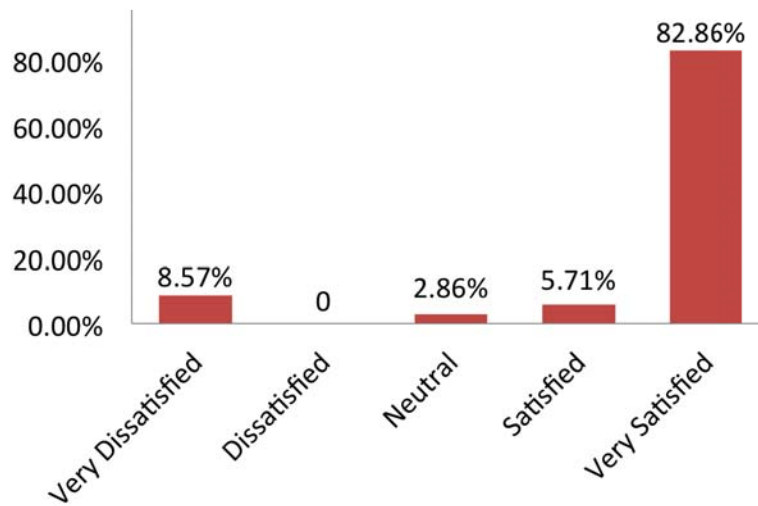


Figure 1. Patron satisfaction with communications about their requests.

Over time, an increased understanding of how GIST works within ILLiad has led to customizations and creative collaborations between library staff to provide the best information specific to Lavery’s needs. The daily workflow is still centralized but takes advantage of the more advanced features in ILLiad, enabling a more collaborative approach. Over the last four years of using GIST, Lavery Library added over 1,673 patron-initiated titles to our collection based on collection management decisions. Circulation statistics show that the approach we’ve taken to purchase on demand encourages decisions that are valuable to our patrons and our collection. Since implementing GIST, the number of Interlibrary Loan requests cancelled has dropped from 24% in academic year 2009/10 to 16% in 2011/12. This has increased the number of books accessed by our patrons to 84%, 27% of those requests being purchased through the use of GIST. Referring back to our circulation statistics, we can see that items purchased using GIST enjoy a much higher percentage of use than items purchased through other collection development methods (i.e., assumption of need, vs. point of need).

Clearly, we continue to meet our original goal to have GIST purchases (on-demand) enjoy at least one circulation. The percentage of our GIST purchases with one circulation has increased over the four years of our program while the percentage of items purchased via traditional collection development methods (in case) with one circulation has remained stable.

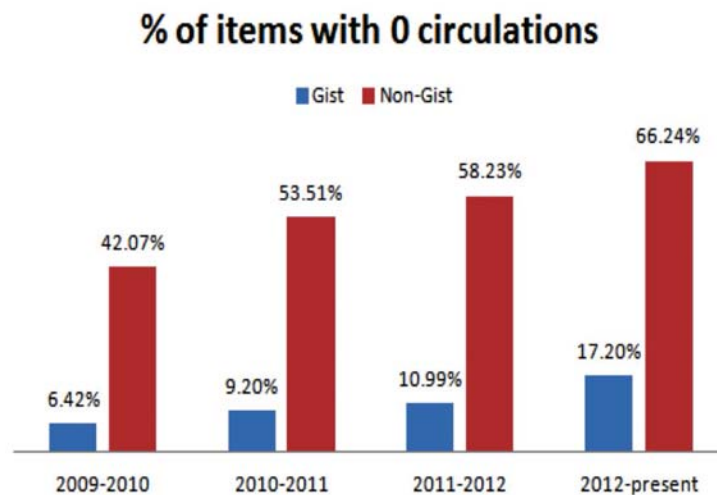


Figure 2. Comparison of zero-circulation items purchased with and without using GIST.

% of items with 1 circulation

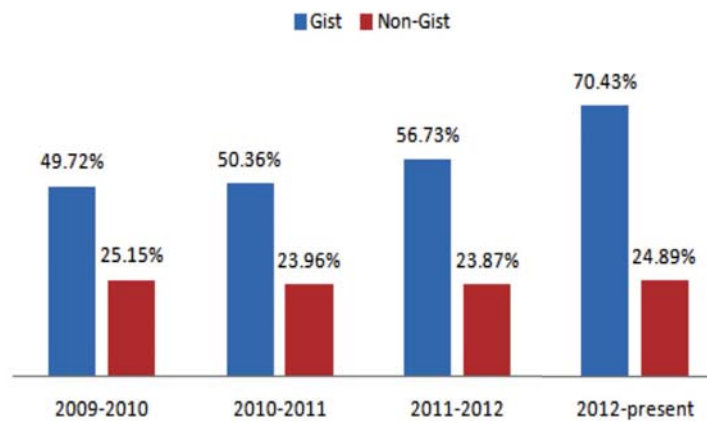


Figure 3. Comparison of single-circulation items purchased with and without using GIST.

Looking beyond the initial circulation of GIST and non-GIST materials, we see that we are moving in the right direction of developing a user driven collection. While the academic library trend is consistently seeing less usage of books as resources by their patrons, the percentage of materials that enjoy more than one usage clarifies our collection development effectiveness. GIST enables us to make this happen.

% of items with 1 or more circulations

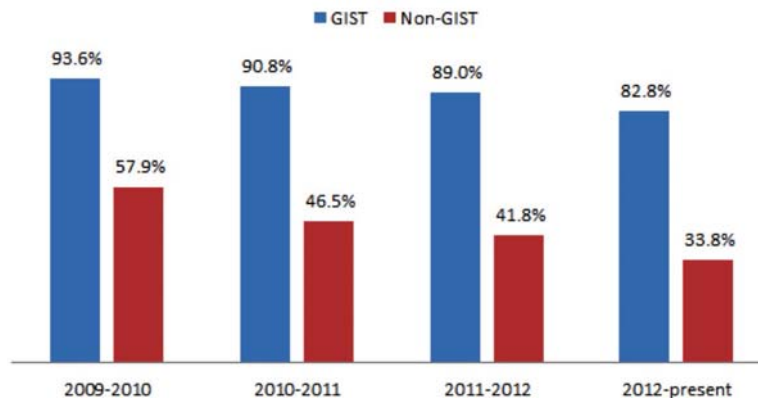


Figure 4. Comparison of multiple-circulation items purchased with and without using GIST.

Lavery Library expanded on the GIST skeleton, adding flesh and muscle to form a complete body of customer service scenarios. We took the available product and enhanced our use to make it work even better within our own environment. We utilized feedback from many participants to create the best, most informed buying decisions for our collection. Ultimately, Lavery Library considers the benefits of meeting the needs of our users while adding items potentially useful to our local population. We weigh this consideration against the costs associated with Interlibrary Loan and the benefit of adding items potentially useful to our resource sharing population.

Cautionary notes

Some library administrators, librarians, and/or staff members may have differing opinions about which department should be responsible for purchasing on-demand requests. GIST purchase requests come in through Interlibrary Loan, though most libraries have a separate department to handle pur-

chasing. At Lavery Library, we kept the GIST purchases in Acquisitions. Our focus on departmental collaboration and utilization of ILLiad allows this process to fit into everyone's existing workflow.

Lavery Library staff could have automated the process significantly; for example, only reviewing faculty requests for purchase. Less attention would have been paid to each request's applicability to our collection and curriculum, however—a sacrifice we have not yet been willing to make.