Interlibrary Loan Transition Breakout Session: Sue Kaler and Catherine Utt

Attendees were given the Draft Interlibrary Loan Transition plan. Sue gave a general update

1. office expansion
2. hiring activities
3. negotiations with networks on use of their symbols
4. Both Quincy and Wellesley use the Clio software to manage their operations. Wellesley has switched to a cloud based version (Clio in the Cloud) which the MLS will use.
5. OCLC switching software from WorldCat ResourceShaving to WorldShare ILL which Sue will be training new staff on system
   1. works well with CLIO

Questions:

1. **No more FirstSearch?** Former Metrowest and NE use FirstSearch to make requests without having to fill out a form. Libraries from other former regions don’t have accounts. Statewide access is prohibitively expensive. Sue is looking into whether there is another way to make requests without filling out a form. Everyone can still search worldcat.org.
2. **Is public worldcat.org going to change?** It might change, but functionality will likely remain.
3. **Typical chain for a library is search within network, then VirtCat, then mediated, then point-to-point or within network, then VirtCat, then Point-to-Point, then mediated; In intro someone said they were hoping for less mediated and more library-to-library; What does that mean?** We’re all hoping there are ways we can do ILL with less staff intervention, but that doesn’t mean putting the burden back to the library. There are also systems for the MLS ILL staff to lessen the number of times staff has to touch things and Sue can set that up for the libraries. It’s called Direct Request. Discovered this direct request is also faster because one doesn’t have to wait for MLS ILL staff. This allows for faster service and for the MLS ILL staff to work on trickier items. Downside is that library becomes responsible for return postage if they make duplicate requests in error. It was pointed out that once noticed it is quite easy to cancel one request so that the library wouldn’t be responsible for twice the return postage. Sue went into detail on how the ILL center sets up the direct request and how it works and the groups and paths to create efficiencies in the system.
4. **From network point of view, SAILS is not member of OCLC; If a library in SAILS places a request, which OCLC symbol are they using?** Previous practice was using MLN and OCLN symbols and we are working with networks to continue this or at least to continue lending from a symbol that has a robust collection. Alternatively, can use an MLS symbol, but MLS doesn’t have the same amount of materials/collection as the networks, so this is limiting. There was also some rumbling in the OCLC world when other symbols went down in MA, so we want to try to maintain the MLN and OCLN symbols or some similarly robust symbol.
5. **If didn’t come to this meeting, how would we have found out about this?** Remember that the service will continue, so the change won’t have a major effect on the libraries. Libraries will have to know whom to contact with issues. We’ll work on making that clear as things evolve. The MLS Announce list is a good place to start.
6. **CLAMS doesn’t use OCLC, but Skyriver. Will staff use other databases or just OCLC?** There’s an assumption that one has looked at a network and VC first, so typically we’ll be looking outside of that. For libraries requesting from CLAMS, this doesn’t really happen right now because the collection isn’t available in OCLC. Unfortunately, we’re just not set up to check other catalogs in MA. Long-term we would like to be able to do some lending form more of those networks. Perhaps once we get borrowing settled, we could talk to OCLC to turn other networks on as supplier. But SAILS/CLAMS holdings aren’t up to date on OCLC because they useSkyriver, so even though it’s relatively cheap to become a lender, we’d need to work this out. VC could be a solution to look at.
7. **Is there incentive to MLN/OCLN for net lending?** Not at this point and no.
8. **Cannot lend from item that’s not in OCLC?** Not easily. VC can do that. We’ll still borrow for libraries not in OCLC, but the library won’t be able to lend. According to Southeast networks which had an ILL center close, it likely won’t make a big differenct. You’ll get fewer lending requests, but borrowing will remain and likely won’t change.
9. **What are the stats?** MLN is asked for about 45,000 items per year to lend and borrows around 12,000 per year. Quincy borrowing is slightly higher than Wellesley and lending is less.
10. **Concerned since VC went down. Request volume has gone up massively at the individual’s library. How are the centers dealing with that?** They’re worried, but they’re coping. And VC should be coming back online in August according to network information. Testing has been going well. Staffing at Wellesley is low, so they’re just getting by. Wellesley won’t reject a request though. Quincy staffing is reasonably stable, which is why we’re transitioning Wellesley first.
11. **It was pointed out that the CWMARS libraries never dealt with point to point, so they might be unfamiliar with the concept.**
12. **Does switching to WorldShare have any effect on the libraries?** No.
13. **Is relationship with FirstSearch for MLN and NE ending?** Don’t know.
14. **Will we continue to receive stats for ARIS?** Yes.

At 11:45, Sue transitioned to demonstrating CLIO in the cloud due to interest expressed.

Sue showed the Wellesley Clio in the Cloud borrowing request form which is very similar to the one Quincy is using now. The form does ask for a patron name which raised privacy concerns. Wellesley has said individual libraries may enter actual patron names, library names or patron barcodes. In the new WorldShare ILL system which will be fully implemented by April 2014, whatever is entered as patron name will only be visible to the borrowing library, not to the potential lending libraries. Sue made a note to ensure she could remove patron names from the Clio database in the newer Cloud based system as she always did in the desktop version of Clio.

Sue then demonstrated how libraries log in to Clio in the Cloud to update their items to received and returned and to manage their renewal requests. There is a learning curve, but the newer system is powerful and gives libraries information in real time.