Interlibrary Loan Transition Plan - DRAFT

Massachusetts Library System

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| Status: This draft document has been prepared by the Resource Sharing Director and the Interlibrary Loan Manager for review by the Informal Task Force on the Interlibrary Loan Transition and the MLS Management Team. – 02.03.2014 |

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## Background

In 2012, Massachusetts Library System commissioned a study of its mediated interlibrary loan service. Among other recommendations in the final report, the consultant, Ruth Kowal, concluded that it would be best to move this service in-house. As an in-house service, MLS would be better positioned to monitor and adapt the service as the resource sharing landscape continues to evolve. MLS would also be better positioned to reduce overall program costs for mediated interlibrary loan that could be reinvested in other member services.

In February 2013, MLS’ Executive Board adopted the consultant’s recommendation to bring mediated interlibrary loan in-house. MLS established a resource sharing department and began recruitment. In September 2013, Stephen Spohn began work as Resource Sharing Director with responsibility for MLS’ activities with interlibrary loan and online content. In January 2014, Sue Kaler joined MLS as Interlibrary Loan Manager with responsibility to establish and operate the mediated interlibrary loan service in-house.

That study is available via the RS Info Hub @ <http://guides.masslibsystem.org/rs>

## Overview of the Transition Plan

## Immediate Objectives

The Resource Sharing Team at MLS is focused on the following immediate objectives (02.2014):

1. Recruit and hire Resource Sharing Assistants.
2. Expand Marlborough office to accommodate ILL operations.
3. Discuss ongoing relationships with MLN and OCD.
4. Implement communications plan.

## Save the Date

### February 2014

* 02.26.2014 – MLS Member Forum on Resource Sharing at Mass Maritime
* 02.27.2014 – Informal Task Force on the ILL Transition – first meeting

### March 2014

* 03.05.2014 – Minuteman Library Network Executive Board meeting
* 03.24.2014 – New RS Assistants on board
* 03.25.2014 – New Resource Sharing Advisory Committee – first meeting
* 03.26.2014 – Clio in the Cloud/ILL Q&A webinar
* 03.28.2014 – MLS Member Forum at Mitre
* 03.31.2014 – *Library Legislative Day*

### April 2014

* 04.02.2014 – Transition Wellesley operations – borrowing
* 04.09.2014 – Transition Wellesley operations – lending
* 04.16.2014 – MLS Spring Meeting
* 04.??.2014 – Clio in the Cloud/ILL Q&A webinar

### May 2014

* 05.0?.2014 – MLS at MLA
* 05.??.2014 – Clio in the Cloud/ILL Q&A webinar
* 05.21.2014 – SAILS Library Network Executive Board meeting

### June 2014

* 06.15.2014 – Transition Quincy operations – borrowing
* 06.??.2014 – Transition Quincy operations – lending
* 06.??.2014 – Clio in the Cloud/ILL Q&A webinar
* 06.??.2014 – New Resource Sharing Advisory Committee meeting
* 06.??.2014 – MLS Member Forum

## Staffing

With the Interlibrary Loan Manager in place, MLS is focused on staffing for the in-house interlibrary loan operations. (The title Resource Sharing Assistant was chosen over Interlibrary Loan Assistant to signal the flexibility in those positions to work on related issues as time allows.) There are eight Resource Sharing Assistant positions for a total of 6.0 FTE – 4 full-time and 4 part-time.

MLS intends to hire the Resource Sharing Assistants in two phases to coincide with the transition of Wellesley and Quincy operations. In January and February, the Interlibrary Loan Manager and Resource Sharing Director will recruit and hire 3 full-time and 1 part-time Resource Sharing Assistants to handle the Wellesley transition. In April and May, they will recruit and hire 1 full-time and 3 part-time Resource Sharing Assistants to handle the Quincy transition and complete to move to in-house interlibrary loan operations. (The first round of searching includes an internal search that encompasses staff members from the two existing ILL centers.)

There will also be an additional resource sharing position that will provide administrative support to all resource sharing operations at MLS including interlibrary loan. The Resource Sharing Leadership Team will recruit and hire for that position in June and July.

## Post-Transition Priorities

### General

* Promote/build incentives for lending.
* Increase equity in lending.
* Revisit policies.
* Strengthen cooperation with ILL partners outside of Mass.
* Explore Clio in the Cloud for lending.
* Revitalize the state and region-wide resource sharing community, e.g. possible NELA pre-conference on resource sharing

### Streamline Workflow

* Increase the accuracy of requests with OpenURL.

### Decrease Mediation

* Increase virtual catalog traffic.
* Increase direct request profiles.
* Promote/build incentives for non-networked libraries to join networks or MassCat.
* Capitalize on existing resource sharing groups, e.g. MRDG, NO$$, LVIS and LYRA.

### Enhance Service to Underserved Member Libraries

* Focus on underserved member libraries – academics, schools, specials and small publics.
* Investigate non-networked libraries and delivery issues.