Expanded Library Delivery

Expanding the Expansion.... Now Participants are throughout All of Massachusetts and Rhode Island
Follow Up

• This presentation is being recorded and will be shared afterwards
• We will send the slides to you, as well
• The MLS has a LibGuide covering the project at:
  • http://guides.masslibsystem.org/interstate_delivery/
• Send questions via chat now or email later. Tell us how it’s working.
Pilot Project

• April 1, 2016 to December 31 2016
• A project of the Massachusetts Library System (MLS)
• Together with the Rhode Island Office of Library and Information Services (OLIS)
• Delivery provided by Optima Worldwide Shipping
• Thanks to Norton Public Library
Expanding the Expansion

• Initial Massachusetts participants were all in the Southeast part of the state.
  – They were all on the S Delivery Route.

• Now we are adding approximately 20 additional participants from throughout the state – starting October 1, 2016.
  – Additional routes include B, C, M, N and W
  – Don’t worry, this will become clear!
Timing Issues

• Participants are Rhode Island libraries and S route libraries through September, 2016.
• As of October 1, the pilot will expand to participants other on Massachusetts Routes.
• Please wait until October 1 to avoid Delivery confusion!
Reasons for the Pilot

• We hope to save money for member libraries in both states.
  – Postage costs continue to go up.
  – There is no longer a deep discount to send light items via First Class mail rate.

• We hope to expand access.
  – Up to 15% of our Massachusetts requesting libraries state wide limit borrowing to items returnable via delivery.
Reasons for the Expansion

• There is no additional cost for us to expand beyond the S region.
• There have been no problems in the initial phase of the Pilot.
• We want to extend the benefit to other member libraries.
• We want to prove this can work.
• Eventually we would love to extend to other states.
Massachusetts Participants: 1

<table>
<thead>
<tr>
<th>OCLC Symbol</th>
<th>MA Route</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMH</td>
<td>W</td>
<td>Amherst College</td>
</tr>
<tr>
<td>BAN</td>
<td>M</td>
<td>Andover Newton Theological School</td>
</tr>
<tr>
<td>BAB</td>
<td>M</td>
<td>Babson College</td>
</tr>
<tr>
<td>BET</td>
<td>M</td>
<td>Bentley University</td>
</tr>
<tr>
<td>MBB</td>
<td>M</td>
<td>Brandeis University</td>
</tr>
<tr>
<td>BDR</td>
<td>S</td>
<td>Bridgewater State University</td>
</tr>
<tr>
<td>BRC</td>
<td>S</td>
<td>Bristol Community College</td>
</tr>
<tr>
<td>CPX</td>
<td>S</td>
<td>Cape Cod Community College</td>
</tr>
<tr>
<td>CKM</td>
<td>C</td>
<td>Clark University</td>
</tr>
<tr>
<td>CUM</td>
<td>S</td>
<td>Curry College</td>
</tr>
<tr>
<td>ENC</td>
<td>S</td>
<td>Eastern Nazarene College</td>
</tr>
<tr>
<td>OCLC Symbol</td>
<td>MA Route</td>
<td>Institution</td>
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<tr>
<td>-------------</td>
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</tr>
<tr>
<td>ECL</td>
<td>B</td>
<td>Emerson College</td>
</tr>
<tr>
<td>EMC</td>
<td>B</td>
<td>Emmanuel College</td>
</tr>
<tr>
<td>BWE</td>
<td>B</td>
<td>Episcopal Divinity School at Lesley University</td>
</tr>
<tr>
<td>FST</td>
<td>M</td>
<td>Framingham State University</td>
</tr>
<tr>
<td>LEY</td>
<td>B</td>
<td>Lesley University</td>
</tr>
<tr>
<td>NDA</td>
<td>W</td>
<td>Massachusetts College of Liberal Arts</td>
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<tr>
<td>MLN</td>
<td>varies</td>
<td>Minuteman Library Network</td>
</tr>
<tr>
<td>NOW</td>
<td>B</td>
<td>New England College of Optometry</td>
</tr>
<tr>
<td>NUF</td>
<td>M</td>
<td>Newbury College</td>
</tr>
<tr>
<td>OCD</td>
<td>varies</td>
<td>Old Colony Library Network</td>
</tr>
<tr>
<td>YHV</td>
<td>S</td>
<td>Plymouth Law Library</td>
</tr>
<tr>
<td>SST</td>
<td>N</td>
<td>Salem State University</td>
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<td>OCLC Symbol</td>
<td>MA Route</td>
<td>Institution</td>
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<tr>
<td>-------------</td>
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<td>-----------------------------------------------------</td>
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<tr>
<td>SCL</td>
<td>B</td>
<td>Simmons College</td>
</tr>
<tr>
<td>MAS</td>
<td>B</td>
<td>State Library of Massachusetts</td>
</tr>
<tr>
<td>STO</td>
<td>S</td>
<td>Stonehill College</td>
</tr>
<tr>
<td>SUF</td>
<td>B</td>
<td>Suffolk University, Sawyer Library only</td>
</tr>
<tr>
<td>YHD</td>
<td>S</td>
<td>Trial Court Library, Barnstable Law Library</td>
</tr>
<tr>
<td>SMU</td>
<td>S</td>
<td>University of Massachusetts Dartmouth</td>
</tr>
<tr>
<td>SNS</td>
<td>S</td>
<td>University of Massachusetts School of Law at Dartmouth</td>
</tr>
<tr>
<td>WEN</td>
<td>B</td>
<td>Wentworth Institute of Technology</td>
</tr>
<tr>
<td>WNE</td>
<td>W</td>
<td>Western New England University</td>
</tr>
<tr>
<td>WHE</td>
<td>S</td>
<td>Wheaton College</td>
</tr>
<tr>
<td>WPG</td>
<td>C</td>
<td>Worcester Polytechnic Institute</td>
</tr>
</tbody>
</table>
MLN Complications

• The MLS loans from Minuteman Library Network under the MLN symbol.
  – Return MLN loans to MLS – Marlborough on the C route. Return slips will be included.
• The MLS borrows for about 150 locations under the MLN Symbol.
  – Most are on Delivery in the M, N or B routes…the route will be in the Borrowing Notes and are on the lists in our LibGuide.
OCD Complications

• The MLS loans from Old Colony Library Network under the OCD symbol.
  – Return OCD loans to MLS – Marlborough on the C route. Return slips will be included.

• The MLS borrows for about 300 locations under the OCD symbol.
  – Most are on Delivery in the S, C or W routes… the route will be in the Borrowing Notes and are on the lists in our LibGuide.
# Rhode Island Participants

<table>
<thead>
<tr>
<th>OCLC Symbol</th>
<th>Delivery Symbol</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRB</td>
<td>BRY</td>
<td>Bryant University</td>
</tr>
<tr>
<td>CCW</td>
<td>CCW</td>
<td>Community College of Rhode Island - all campuses</td>
</tr>
<tr>
<td>PJW</td>
<td>JWA</td>
<td>Johnson and Wales University</td>
</tr>
<tr>
<td>PRC</td>
<td>PCO</td>
<td>Providence College</td>
</tr>
<tr>
<td>RCM</td>
<td>RIC</td>
<td>Rhode Island College</td>
</tr>
<tr>
<td>RDS</td>
<td>varies</td>
<td>Rhode Island OLIS</td>
</tr>
<tr>
<td>RSD</td>
<td>RSD</td>
<td>Rhode Island School of Design Library</td>
</tr>
<tr>
<td>RWB</td>
<td>RWU</td>
<td>Roger Williams University</td>
</tr>
<tr>
<td>SLV</td>
<td>SRC</td>
<td>Salve Regina University</td>
</tr>
<tr>
<td>RIU</td>
<td>URI</td>
<td>University of Rhode Island, Kingston</td>
</tr>
<tr>
<td>RIN</td>
<td>UPM</td>
<td>University of Rhode Island, Narraganset</td>
</tr>
<tr>
<td>RIX</td>
<td>URP</td>
<td>University of Rhode Island, Providence</td>
</tr>
</tbody>
</table>
RDS Complications

• OLIS lends from their collection under the RDS symbol.
  – Return slips will be included.

• OLIS borrows for many libraries in Rhode Island under this symbol.
  – Most are on Delivery and can be found on the list of Rhode Island Delivery Locations on our LibGuide.
Traffic Flow

• Optima’s Plymouth sort site (handling the S Route) has a slot for items going to RI.
  – Items from outside of S will get to Plymouth via the Cross State truck.

• Those bins for RI are dropped off at Norton Public Library (thanks so much.)

• The RI truck already going from Providence to Wheaton College (thanks HELIN!) detours to Norton Public Library for a pick up and drop off of interstate bins.
Traffic Flow continued

• The special stop at Norton Public Library happens 3 times a week.

• Items for RI go from Norton Public to Optima’s Providence sort site where they are sorted as usual.

• For reverse traffic, Optima’s Providence sort site has a slot for items going to MA libraries along the same path in reverse.
  – If the destination is outside of S, items go on the Cross State truck, as usual.
Routes cover these territories

W western part of C/W Mars
C eastern part of C/W Mars
M Minuteman
N MVLC and NOBLE
B MBLN and FLO
S OCLN, SAILS and CLAMS
Sort Sites
Plymouth...S Route
Wilmington...B, M &N Routes
Oxford...C & W Routes
MA Delivery Slips

- Items headed to MA participants need Delivery Slips headed with the Route Designation.
  - B, C, M, N, S or W
- MA slips should have the town or college on the Town/Institution Line.
  - Use Bridgewater State University.
  - Do not use Clement C. Maxwell Library.
Sample MA Delivery Slips

TO:
Bridgewater State University

TOWN/INSTITUTION

ATTENTION: ILL

DATE SENT:

FROM:
Community College of Rhode Island

ROUTE:

NOTE:

DELIVERY PROVIDED BY: MASSACHUSETTS LIBRARY SYSTEM

TO:

TOWN/INSTITUTION

ATTENTION: ILL

DATE SENT:

FROM: Rhode Island

ROUTE:

NOTE:

DELIVERY PROVIDED BY: MASSACHUSETTS LIBRARY SYSTEM

TO:

TOWN/INSTITUTION

ATTENTION: ILL

DATE SENT:

FROM: Rhode Island

ROUTE:

NOTE:

DELIVERY PROVIDED BY: MASSACHUSETTS LIBRARY SYSTEM
RI Delivery Slips

• Rhode Island slips are headed with a Rhode Island Designation.
• They use a three letter code for each participant.
• The Delivery Code is NOT the OCLC code in most cases.
• Bryant University is BRY for Delivery although their OCLC symbol is BRB.
  – Use BRY, not Bryant University.
  – Use BRY, not BRB.
# Sample RI Delivery Slips

<table>
<thead>
<tr>
<th>Rhode Island</th>
<th>Rhode Island</th>
<th>Rhode Island</th>
<th>Rhode Island</th>
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<tbody>
<tr>
<td><strong>CCW</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sent from</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bridgewater State University</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Date:** ____________

**Sent from:** ____________

**Date:** ____________

**Sent from:** ____________

**Date:** ____________

**Sent from:** ____________

**Date:** ____________

**Sent from:** ____________

**Date:** ____________

**Sent from:** ____________
When you are Borrowing

• Favor these new delivery lenders in your custom holdings paths.
• Research a custom holdings group of delivery lenders in the opposite state.
  – Several groups depending on formats?
• Check in the OCLC Policies Directory.
• Check on Sue’s AV lenders list in ShareILL: http://shareill.org/document-suppliers/custom-holdings-lists/sues-av-lenders-list/
Making Custom Holdings Groups

• Go to the OCLC Service Configuration module: https://www.worldcat.org/config/
  – Click on WorldShare ILL.
  – Click on Custom Holdings Groups.
  – Click on Create a New Custom Holdings Group.
  – Enter the desired symbols.
  – Save the new group(s.)
Using Custom Holdings Groups

• Stay in the OCLC Service Configuration module under Worldshare ILL.
  – Click on Custom Holdings Paths.
  – Select the appropriate path.
  – Drag the new Custom Holdings Group into the proper place in the path, moving it from the left box to the correct position in the right box.
  – Save your work so changes will activate at your next login.
If You Use ILLiad

• You still may want to use the OCLC Service Configuration to make a new Custom Holdings Group or Groups and edit your Custom Holdings Paths.

• Minor tweaks to existing Custom Holdings Paths and Tweaks can be done from within ILLiad.

  – For help with ILLiad editing, contact Tressa Santillo (tressa@masslibsystem.org)
Returning Borrowed Items

• Hopefully there will be a return address slip in the item.
  – If not, check the Delivery Directories for libraries participating in the Pilot
  – RI libraries needing a MA address look here: http://guides.masslibsystem.org/interstate_delivery/RIlibraries
  – MA libraries needing a RI address look here: http://guides.masslibsystem.org/interstate_delivery/MAlibraries
When you are Lending

• Check to see if the requesting library is participating in the pilot.
  – If so, send the item to them via Delivery.
  – Include a properly filled out return address Delivery slip addressed to your library.

• Delivery Directories are here:
  – http://guides.masslibsystem.org/interstate_delivery/RIlibraries
  – http://guides.masslibsystem.org/interstate_delivery/MAlibraries
Statistics

- Please keep track of traffic between participants during the Pilot and report them.
  - https://www.surveymonkey.com/r/ExpandedDelivery

- OCLC’s Reciprocity Report:
  - Is available per symbol only
  - Does not have states identified
  - Does differentiate loans vs copies

- ILLiad’s Who do I Borrow From and Who Do I Lend To:
  - Is available per symbol only
  - Does not have state identified
  - Does differentiate loans vs copies
Evaluation

- Satisfaction survey
- Statistical report
- How much money was saved?
- Is future expansion possible and/or desirable?
- What other states could participate?
- Let’s make this work!
- Thank you for participating!
Upcoming Event

• New England Library Association Annual Conference
  – October 16 – 18, 2016
  – DoubleTree by Hilton, Danvers, MA

• Library Delivery in the Northeast: What's Up, What's New? Table Talk
  – Chaichin Chen and Sue Kaler
  – Sunday, October 16 2:30 – 3:30
Questions and Concerns

• From the MLS
  – Sue Kaler, Interlibrary Loan Manager
    • sue@masslibsystem.org
  – and the Resource Sharing Assistants
    • ill@masslibsystem.org

• From OLIS
  – Chaichin Chen, Resource Sharing Coordinator
    • Chaichin.chen@olis.ri.gov