

Members Council May 2003
Interest Group
Discussion Summary Report

Name of Group Cooperative Reference

Recorder Sonya Oliver

1. Summary of topics & discussions

Collection Management (Tam Dalrymple, Manager, WorldCat Services Marketing; Lorraine Normore, Consulting Research Scientist)

Tam and Lorraine described the current efforts to investigate the use of WorldCat in a collection management tool. Following the needs assessment phase, scheduled to end in June 2003, OCLC staff will develop a business plan.

The prototype that has been developed for this project is a web-based tool with an interactive graphic interface. The tool employs a "conspectus" for the analysis of subject-related information.

Tam and Lorraine asked the committee to respond to several questions about collection management and their current and potential use of WorldCat for this activity.

1. What does collection management mean at your institution?

Responses to this question ranged from a focus on withdrawals or material transfers as key functions of collection management to a collection management function that encompasses everything from selection to withdrawals. In some libraries, collection management is a more proactive effort to build library collections in specific disciplines to support curriculum changes.

OCLC should pay attention to the terminology it uses to describe this service. The libraries represented in this group tend to use different terms to describe the function of developing and maintaining adequate collections to support user needs. The terms collection development, collection management, selection and acquisitions are related to this function.

Some libraries are involved in collaborative collection management efforts. In the United Kingdom, libraries are actively moving in this direction. They used the WLN software 2 years ago, and found it to be very useful. The mapping activity in the tool described by Tam and Lorraine would be of use to support this work. Libraries in Oregon are also considering a more consortial approach to collection development. Others expressed concern about pursuing collaborative collection development unless a stable regional storage and delivery system is in place.

Some institutions have periodic needs for this type of information for accreditation purposes.

2. Do any of you use WorldCat for collection management now?

Few members were aware of specific ways their libraries use WorldCat for collection management. One member mentioned using it in a very basic way, by considering the number of holding libraries as one element of the management process.

Another member suggested that WorldCat would be of use if it were linked to frequency of citation data. It would be useful to see which items are most often cited in authoritative sources. The number of holding libraries could be considered similar to a ranking by number of citations.

3. What other electronic services do you use for collection development?

A single member responded, " This is the best I've seen."

4. What features should be included in the initial release of this service?

Suggestions included:

- Selection information so staff knows where to get the items they need.
- Benchmarking against peer libraries.
- Continuous access to analysis, rather than providing only a single snapshot. This will enable staff to judge their progress over time.
- Push technology with updates, including updates tailored to specific subject areas.
- Support for verification of recent changes in the collection.
- Interplay between print and electronic resources.
- Graphical representations.
- Date of analysis should be included in all reports.
- Consider WorldCat as a deselection tool, to help libraries decide what they do not need to maintain in their collections.
- At some point, it would be useful to include an interface between the collection management tool and ILLiad to provide statistics about the most borrowed items.

5. Which criteria would public libraries need to compare their collections?

- Ability to compare against libraries with known strength in specific subject areas, in addition to the option to compare with other publics of the same size.
- Flexibility to vary criteria by project. For example, it would be helpful to compare with other libraries in a geographic area for high-demand items. For development of specific subjects, it would be useful to compare with libraries in communities with populations of a comparable size or volume of circulation.
- A way to compare a collection to a "median" of holdings of a group of peer libraries.
- View data about which WorldCat records are viewed most, since this could indicate which items are of most interest to library users.
- Keep the information focused on specific needs, but don't provide too much data. Selectors often like to have a lot of information at hand during the selection process, but its availability may not change the way they actually make their selections.
- Provide a way to help public libraries judge the need for multiple copies of popular items.

6. Are you interested in viewing reviews or recommendations through WorldCat?

Some libraries would use reviews in scholarly journals of different disciplines. Others would benefit from access to subject-specific lists of authoritative resources such as the collection of the Baker Library for business or reviews in the Journal of American History for American history.

QuestionPoint and Elearning (Pat Stevens, Director, Cooperative Initiatives; Heidi Sander, Business Development Manager, Cooperative Initiatives)

QuestionPoint

Pat Stevens provided an update on QuestionPoint usage. 43% of the libraries using QuestionPoint are public libraries, followed by 30% 4-year academic libraries, 17% "other", 6% special libraries and 4% 2-year academic libraries. Public libraries tend to receive more questions from the global network and academic libraries tend to send more questions to the global network. Countries with the largest established bases of users are the United States and the Netherlands, with increasing usage in Canada, China, Japan and the United Kingdom.

Group members requested regular updates of this usage information. As it becomes available, they will also be interested in statistics about usage by subject area of reference questions.

Members commented briefly on the use of virtual reference in their institutions and consortia:

- Not all member libraries offer virtual reference, due to cost and the change factors for staff.
- The 24/7 project in California is built on a collaborative model that relies on each library contributing several hours a week to support reference for the entire group. Virtual reference collaboration requires that all participating librarians are very familiar with resources in collections of all participating libraries. 24/7 relies heavily on chat, while QuestionPoint provides more flexibility for managing reference questions from a variety of sources (in person, email, chat, etc.)

- Virtual reference is not used by all library users yet, even those who are technically savvy.
- Virtual reference helps academic libraries easily transfer genealogy questions to the appropriate public libraries.

Elearning

Heidi Sander provided an overview of current OCLC Elearning initiatives. OCLC has assumed the role of advocate for libraries in the elearning environment. OCLC staff is now investigating cooperative-based services for elearning. The work in elearning is currently focused entirely on academic libraries, and may include public libraries in the future.

Questions and comments from the group included:

- Are any pilot sites also linking to particular content for courses? Response: This will depend on the courses selected for the pilot.
- One disconnect is that libraries have content faculty don't always know about. It is a constant challenge to get faculty to include library resources in their coursework.
- Will there be a link to netlibrary? Response: This might happen in the future. The project will begin with virtual reference partly because QuestionPoint and elearning reside in the same OCLC division and partly because it illustrates that library service is more than just physical or electronic resources.
- This is a "very exciting development." It will be important to create effective channels for communicating with users of elearning tools to minimize confusion. For example, students should know clearly who will answer questions about assignments and who will answer questions about resources.
- A study guide with embedded local links could be helpful.
- Elearning tools could also be used for professional development of library staff.

OCLC FirstSearch Database Update (Chuck Costakos, Director, Content Services, Cooperative Discovery Services)

All databases from H. W. Wilson except Wilson Select Plus will become subscription-only in December 2003. Wilson will offer discounts to libraries that transition from per-search to subscription. In addition, OCLC will add PDF images to Wilson Select Plus in October 2003.

Group members view this move as another example of an ongoing trend in the information industry. Database producers distribute their databases through a number of channels, including their own web services. In addition, users tend to be more comfortable with interface variations on the web than they were with past interfaces, so they don't need to have a large number of databases available through a single interface. Libraries are also trying to stretch their buying dollars as far as possible. When a database is available at a much lower price on a database producer's site than through FirstSearch, they will purchase at the lower price.

The group suggested that OCLC consider discontinuing access to 3rd party databases, given the recent trend of databases producers to emphasize access through their own interfaces and to require subscription purchases on FirstSearch.

Feedback on Key Issues Document

The committee provided the following suggestions for the report "OCLC Senior Leadership Team Responses to Members Council Interest and Library Groups Report":

- The report is informative and a "major step forward" in communicating with delegates - Please continue to compile this information.
- It is useful to know who is responding to each issue.
- Distribute the report earlier so delegates have time to read it before the meeting.
- Groups should be more specific in stating their questions and issues so leadership can provide more specific responses.
- Organize the issues by topic rather than responder, noting responders in the text.

Meeting Topic Discussion: How do local/state relationships affect our relationship to OCLC and each other?

The predominance of consortia and multiple consortia memberships by libraries presents an increased challenge for OCLC marketing. One positive aspect of consortial purchases is that once a group makes a decision, it usually does not want to change services again in the near term.

Regional service providers are often seen as useful intermediaries that simplify some complexities of group purchases and sometimes help libraries and groups identify funding sources for major purchases. Several members noted, however, that they sometimes don't know whether to work with regional service providers or OCLC for assistance with questions before and after a purchase. The group suggested that OCLC provide an updated table of the sales and support responsibilities of all regional service providers for both OCLC and non-OCLC service that includes options for consortia.

Some libraries "shop" among different regional service providers for non-OCLC services, to help groups benefit from different price options.

Some consortia span the territories managed by several regional service providers. This presents an opportunity for OCLC and regional service providers to examine how they can work together to provide appropriate service.

Cooperative collection management will become more interesting as libraries move from cooperative retention plans to cooperative acquisitions. Christine Bailey recommended **The Follett Report** <http://www.niss.ac.uk/education/hefc/follett/report/> for background on the efforts underway in the United Kingdom.

Models for virtual reference collaboration are just developing now, and may be different from existing models for collaboration in other service areas. While many librarians are looking to virtual reference solutions for sharing expertise in specialized areas, some expect that it will also be beneficial to libraries with similar collections and staff expertise. In fact, collaboration among libraries of a similar type may add to credibility in academic institutions.

The group recognized that funding sources often affect the way a group makes purchase decisions. Comments included:

- Lack of funding may drive libraries toward collaboration as a way to stretch budget dollars. It is more difficult for a group of libraries to work together on a purchase decision if they don't already exist as a group for other reasons.
- In the absence of outside funding, strong leadership and vision are needed.
- Many consortial efforts are completely volunteer.
- Differential pricing.
 - OCLC should expect different levels of use from different sizes and types of libraries and should price services to groups according to the membership characteristics.
 - In some cases, differential pricing has resulted in research libraries inability to purchase resources that smaller libraries can afford. This tends to occur most often with mature products.
 - Differential pricing is appropriate for newer services such as digitization.

The group briefly discussed the library access cooperative that was presented to the full Members Council. Suggestions and comments included:

- Give users the option of entering multiple zip codes to locate libraries in more than one place. This would accommodate situations when a person works in a zip code distant from her home address. Others suggested providing an option to enter a community name instead of a zip code.
- Academic libraries might like to see a default search to an existing consortium.
- In some places, mixing access to public and academic libraries could be confusing to users. For example, in an area with a statewide academic consortium with a shared catalog, the group would not want to confuse their users with information about materials in public libraries. Also, some academic libraries only want to serve their immediate user population and not the general public.