

OCLC Members Council Resource Sharing Interest Group May 19 and 20, 2003

Interest Group Attendees

Joan Kuklinski (serving as co-chair), Charles Kratz (serving as co-chair), Mary Alice Lynch, Paul Dumont, Bruce Newell, Michael La Croix, Michael Kathman

Topics to consider for future meetings:

- Update on
 - next generation fulfillment service
 - e-content through WorldCat
 - Illiad's new document delivery component
- International resource sharing including document delivery
- Rights and resolution as it relates to resource sharing
- How libraries can achieve the goals of resource sharing in today's tight economic environment
- Bundling of services such as management statistics and collection management data to both add value

Most important issues were

- Convergence of circulation and ILL
- Critical need for a single resource sharing workflow
- Resource sharing was not just going to increase but that if it doesn't it will be because of a serious failure on the part of libraries to prove their relevance to their users. Resource Sharing as provided by today's relatively few high volume lenders has natural limits because of its staff-intensive nature and that the only way to address this is by sharing the load across all members of a group. To increase resource sharing, it must be spread across the entire membership of any cooperative in order to meet the needs of the cooperative as a whole
- Important of continuity—libraries must be able to trust that a new product or service will continue before they can afford to commit time, staff and funding
- Importance of appropriate pricing models for getting item level holdings added to WorldCat. If strategy is built around WorldCat holdings then there must be very (!) affordable and easy ways of getting those item level holdings into WorldCat)
- Incentive marketing of Group Catalog Service to SiteSearch customers.
- Server for e-documents to facilitate delivery to member libraries.
- Greater promotion of Global Sharing Group Access Capability.

Group Services Update: Doug Loynes

Doug Loynes provided a brief overview of group services, including these components:

- Group catalog: a view of WorldCat representing the holdings of a consortium
- Z30.50 dbase gateway: a Z39.50 database portal built into FirstSearch
- Subscription ILL: includes online ILL, IFM, Union Listing, stats
- Subscription cataloging (metadata services): includes Connexion and batchloading

Group Discussion: it's critical that the catalog be built from the holdings of all members of the group and that the cost for building the catalog be very affordable (ideally, free). This includes both libraries that have not previously contributed holdings and those that have used 'cluster' cataloging (many libraries all on one symbol). Libraries will need to understand the level of customization of content, for example, can each library offer its own users additional content in addition to what is supplied to the group as a whole? The group discussed the Group Catalog solution as compared to a distributed Z39.50 search. The Group Catalog pilot shows performance to be considerably faster, as well as having the ability to provide consistent, in-depth, indexing across participants. OCLC might consider incentive pricing to help current Site Search libraries move to this model.

Groups will have different expectations, with the interest groups there were libraries that would want to begin with searches restricted to their groups, others that would want to begin with all of WorldCat and scope to the group if necessary. Other considerations is how groups could be structured, e.g. around delivery times or around mutual borrower agreements—any of these can be supported. Delivery times vary greatly loans to

copies. OCLC's solution is intended to cover all fulfillment whether returnable or copy and all forms of e-delivery including inbound/outbound linking. OCLC should consider using a resolution service with the group catalog and fulfillment offering.

OCLC must closely partner with regional networks to offer, train and support this model. Many libraries have a closer relationship with their network than they do with OCLC.

E-content in WorldCat (Deb Bendig)

OCLC currently supports outbound linking to NetLibrary as well as browse access to ArticleFirst from periodical records in WorldCat. Also described plans to link to Project Gutenberg titles and to records in other FirstSearch dbases, including Book Review Digest and Books in Print, to provide access to reviews. Asked group to suggest other possibilities . .

Group Discussion: Adding Project Gutenberg access to WorldCat is a "marriage made in heaven." OCLC should link to materials digitized by libraries including indication if material is in the public domain. In addition to providing more e-content this would help libraries identify materials that have already been digitized (not duplicating others efforts). Access to vendor-provided e-content is also important including some form of bib notification. There needs to be ways to limit searching to just those materials that can be delivered immediately through e-access.

Everyone wants as much e and evaluative content as possible, including the ability to link from a Table of Content (TOC) to content itself. Adding more evaluative content might require a price increase (OCLC needs to pay for the content it adds). TOCs could be provided by member libraries (perhaps by expanding the enhance program) or, OCLC could make the record with the TOC available to cataloging members.

RSIG would like an update on this topic at the October meeting.

Montana State Catalog (Bruce Newell)

Bruce described the Montana virtual catalog, which uses SiteSearch to provide a virtual catalog of 6 regional catalogs, as well as access to a number of Gale databases and WorldCat.

Resource sharing options:

1. Email option – request goes to specified address for library ... used by small libraries
2. ISO ILL via OCLC – used increasingly, and increasingly by smaller libraries . . . works well (80-85 libraries doing this)
3. LaserCat (CDROM product)

Group Discussion: This model makes it possible for small libraries to use OCLC without needing to understand it. Also, small libraries are able to use Web ILL pretty easily. URSA provides a virtual catalog along with direct circulation. It's important that users be able to specify their pickup location, users expect to be able to use whatever library is convenient to them at that time.

ILL Policies Directory Update (Mark Tullos)

Mark provided a demo of the new Web ILL policies directory (<http://www.oclc.org/oclc/ill/illpolicies.htm>)

As suggested by RSIG at the winter meeting, one of the most recent enhancements is the ability to search by libraries willing to ILL across borders. This enhancementThe group was generally positive about the directory and impressed with its capabilities. It's important that OCLC use this opportunity to have libraries revisit their policies rather than simply re-entering outdated policies. Also suggested that it would be interesting to take a look at the nature of ILL policies to determine how to model policies for types of libraries.

Convergence of Circulation and ILL (Collette Mak)

Note: this discussion began on Monday and continued into Tuesday. Collette asked the group to report on plans for enabling NCIP in their own resource sharing environments.

The critical aspect of the service is what the patron wants. This includes requesting any available item, from any library in the group, and having it delivered to any library they choose. How it happens should be transparent to the user. Groups are using direct borrowing where possible, for the most part these are libraries with a common local system, the exception being URSA. Direct borrowing is seen as superior to ILL because of lower staff costs and the efficiencies of circulation. The group feels that most libraries will have NCIP modules available to support direct borrowing within two years.

Collette briefly reported on OCLC's investigation of a "next generation" resource sharing system, which would integrate circulation with resource sharing and electronic content delivery.

Group Discussion: Libraries need to understand how this system would interact with other systems such as FDI. It's critical that OCLC's service must be integrated into the workflows/systems already in use. Load leveling is also important, this reflects Monday's discussion that needs of libraries differ where policies for one type of library may differ from other types. The system must be able to follow the business rules of many types of libraries. The important thing is that end-users be presented with a coherent set of options that feed into a single workflow for the library. Authentication will be a critical issue including privacy issues and what information is passed beyond state lines.

Are local systems the primary competition for this service? No, Chip explained that group services is aimed at large, multi-type consortia in which multiple ILS systems are supported and in which the majority of large libraries use OCLC cataloging, ILL and FirstSearch.

WorldCat is a key benefit of OCLC's approach – a benefit that cannot be replicated by a regional system.

Subscription Pricing for OCLC ILL (Collette Mak and Chip Nilges)

Collette described OCLC's subscription pricing for ILL and asked the group for its reaction to the model.

Group Discussion:

There was general agreement that subscription pricing is welcome, but it was equally clear that additional fees for this service would be difficult if not impossible to find in the current economic climate. Incremental funding may be available at the state or consortial level, and perhaps from large institutional subscribers; but obtaining those funds will require OCLC to demonstrate how its solution will save the buyer money on other services. Every consortium is in financial trouble because of funding issues; OCLC group services must demonstrate that it can save money, or consortia will not spend more money with OCLC to get it. OCLC has positioned group services well and that the timing is good, because resource sharing is on the rise, OCLC should begin marketing to net lenders, because they have the resources to buy it.

It is critical that the next generation resource sharing solution must integrate all fulfillment options into a single workflow. OCLC needs to bundle its own offerings with services that libraries/groups can use less to supplement but to substitute for current work—libraries can afford to substitute services especially if there are demonstrable cost savings but can not take on additional expenses.