

## **Joint Meeting: Cooperative Reference Interest Group & Resource Sharing Interest Group**

Monday, October 21, 2002

OCLC's group services initiatives: Joint Meeting of the Resource Sharing and Cooperative Reference Interest Groups

Lynne King, NyLink (Chair, Cooperative Reference Interest Group)

Shirley Leung, OCLC Asia Pacific (Chair, Resource Sharing Interest Group)

Doug Loynes presented OCLC's WorldCat "group catalog" service concept, which includes:

- A customized view of WorldCat, representing the holdings of a library group
- A customized view of FirstSearch
- Unlimited, group-wide access to FirstSearch WorldCat, OCLC ILL, IFM, ILL stats and Union Listing

Doug explained that OCLC is piloting this service concept this year and may roll it out in the summer of 2003.

Comments from the committee included the following:

- Michael Kathman, Minitex – Raised the issue of OCLC's history of starting and then discontinuing projects similar to this, eg, SiteSearch. Tam Dalrymple commented that a key difference between this and earlier approaches to regional catalog/resource sharing solutions is that this approach is built around two core services with long histories – WorldCat on FirstSearch and OCLC ILL.
- What is the strategy for rolling the service out, given that many library systems are adopting new services now? Doug Loynes commented that OCLC is developing the service in response to RFPs that are coming out this year and beyond.
- Ann Parent asked if the pilot libraries include a mix of OCLC and non-OCLC libraries? Doug responded that we are piloting with OCLC libraries, but the groups they are in include many non-OCLC libraries. If the service goes into production, we will need to address the needs of those libraries, as well.
- Joan Kuklinski noted that many small libraries won't have records to batchload. Doug responded that OCLC would offer retrocon services to meet this need.
- Shirley Leung asked how patron authentication would work. Doug explained that current FS authentication options will be supported, and that OCLC is in the

process of implementing patron authentication against local systems, using the NCIP protocol.

- Judy Fox asked if the service will be interoperable with existing local systems. Doug explained that it will be possible to integrate local catalogs with the WorldCat union catalog in three ways. First, libraries will be able to link from FirstSearch to Z39.50 compliant OPACs. Users who search a linked OPAC will be able to expand their search into their WorldCat union catalog. Also, since the WorldCat union catalog will itself be Z39.50 compliant, it will be possible to present it as a database using Z39.50 client software of the library's choosing. Finally, using the inbound linking capability currently supported with EBSCO, Bowker, Gale and ProQuest, it would also be possible to link to the WorldCat union catalog from records in the library's OPAC.
- Michael Kathman asked how the service would interface with third party databases from organizations other than OCLC. Doug explained that it will be possible to link from third-party content from a number of providers (EBSCO, Gale, ProQuest, Bowker and others) to WorldCat union catalog holdings at the record level.
- Shirley Leung pointed out that WorldCat will continue to be a secondary resource outside of the US, due to the low concentration of international holdings.
- Stephen Rollins commented that he doesn't view WorldCat as a resource of first resort, due to the cost.
- Michael Kathman expressed his desire for the service to be interoperable with local/regional ILL systems, such as FDI. He pointed out that the first version of the service must interoperate with systems that are already in place. If OCLC can do this, they may be able to convert users to a fuller OCLC solution later on.
- Paul Dumont pointed out that several state libraries are considering statewide union catalogs, including Texas. He asked if OCLC had responded to the Texas plan with the group services approach. Doug explained that OCLC had responded with a "pre-pilot" version of the service that included a "Texas" version of WorldCat and a Z39.50 gateway to catalogs in Texas.
- Judy Fox stressed the importance of starting a user in the local catalog, due to the cost of searching in WorldCat.
- Chris Bailey said that she might consider migrating to an OCLC solution in 3-4 years if it could operate as a local system and asked if OCLC is going in this direction. Chip Nilges explained that OCLC's goal is to interoperate with local systems and focus its attention on serving as a union catalog and resource sharing solution.

- Paul Dumont pointed out that ILS vendors will be threatened by this approach.
- Jerry Stephens asked if users of the OCLC solution will have the ability to create user groups on the fly through the interface? Doug explained that in version one groups will be profiled up front and will be fixed (though it will be possible to modify them periodically).
- Michael Kathman asked about the possibility for making the local data that OCLC has captured over the years accessible through this service. Doug explained that this option is being discussed but will not be possible until OCLC has migrated to the Oracle platform.

Resource Sharing Interest Group  
Tuesday, October 22

Shirley Leung, OCLC Asia Pacific (Chair, Resource Sharing Interest Group)

Attendees: Michael Lecroix, Michael Kathman, Shirley, Paul, Charles Kratz, Joan Kuklinski

OCLC staff present: Chip Nilges, Collette Mak, Judith Carter, Cathy Kellum, Mark Tullos, and Sue DeTillio.

Collette Mak's gave the group an overview of OCLC's plans for its ILL system and related services. Comments included the following:

- Paul Dumont asked Collette about the gaps that she described between FirstSearch and OCLC ILL users, and among the use of various ILL services. Collette recited stats on the difference between the number of IFM users (1,730) and ILL users (~7,000), and the number of FirstSearch users who have turned on the link to ILL via FirstSearch (933) vs. the number who could do this (~6,500).
- Michael Kathman suggested that the relatively low number of libraries that have enabled the FirstSearch ILL link may reflect the fact that libraries are using their local system for resource sharing. He also suggested that part of the problem is getting to the right people in the library, eg, reference and resource sharing.
- Shirley asked if OCLC would at some point move all ILL users to the ILL Web interface. Collette said yes, but that the date has not yet been set.
- There was considerable discussion about how ILL and ancillary services could be marketed more effectively. Michael Kathman suggested that OCLC might be more successful in getting libraries to adopt its ancillary ILL services (eg, IFM) by packaging and presenting them as a suite of productivity tools and marketing them to library directors and administrators who manage overall institutional

costs. Others echoed this sentiment. Along these lines, Charles Kratz emphasized the need to repeat messages, and to send them to staff at different levels, including line staff, management, and beyond. Shirley asked if there were incentives that OCLC could offer to adopt these services. The group agreed that OCLC should develop an integrated marketing message that describes these services as productivity tools and details the savings libraries would experience by using them.

- Joan Kuklinski asked if OCLC has considered allowing libraries to upload local data from local system to OCLC. Collette described recent and planned improvements to the OCLC batchload service that make it possible to convert data in many formats to MARC.
- Michael Kathman asked for a FirstSearch enhancement that would allow libraries to link from their FirstSearch accounts to their own ILL systems.
- Joan Kuklinski and Michael Kathman commented that a fixed pricing model for ILL and other OCLC resource sharing services is attractive, both because it would encourage use and make costs predictable.

Cathy Kellum of OCLC gave a presentation on OCLC Union Listing. Comments included the following:

- Michael Kathman asked how OCLC will communicate the planned LDR enhancements to FirstSearch and OCLC ILL. He pointed out that LDRs tend to be maintained by the cataloging staff, not the ILL or reference staffs. He also pointed out that these enhancements will need to be marketed differently by library type. (E.G., to the director in academic libraries, or to the head of cataloging or ILL in a public library.)
- Michael Kathman also stressed the need for OCLC to be able to quantify for libraries the value of IFM and serials union listing, as part of its marketing message to prospective users.
- Shirley asked if OCLC is presuming that libraries have all serials holdings in OCLC. Cathy pointed out that this is not required; using the LDR batch updating service sets holdings in WorldCat.
- Michael Kathman asked OCLC to consider linking to serials solutions and, more generally, to resolution services.
- There was also considerable discussion during this part of the meeting on how OCLC should market its LDR services. Shirley recommended advertising using the ILL listserv, and Michael suggested that these services need at least two marketing pieces, one aimed at tech services and a second aimed at ILL librarians.

Kathleen underscored the importance in this economy of stressing the fact that the LDR updating service is free through fiscal 2003, and Michael again stressed the importance of showing how the service improves the library's workflow. Michael asked Cathy to send members of the committee a brief note on the service and suggested that committee members might be willing to talk with their networks about it. Charles Kratz offered to share such a message at his annual meeting, and others offered similar suggestions. There was general agreement that OCLC should put together a marketing piece on its ILL-related productivity tools and get them to users through OCLC networks. This piece could include testimonials, cost-benefit analyses, and specifics regarding workflow improvements that result from using these services.

Myrtle Myers of OCLC reported on a survey that OCLC conducted on union listing

The survey was conducted by email and included all libraries that use OCLC union listing. OCLC has received 276 responses to date, and they are still coming in. Myrtle then related findings, which are in her presentation.

- Michael Kathman and others asked about the relationship between union listing for print and electronic serial titles. He pointed out that MARC standards require separate records for print and electronic and asked about how cases in which a series is held partially in physical and partially in digital form. He also expressed his desire to load OCLC LDRs into Serials Solutions.
- The group expressed its desire to consider union listing in the larger context of managing print and digital serials subscriptions.

The meeting concluded with a discussion regarding possible future topics. Candidates included

The impact of OCLC's transition to an Oracle platform on OCLC resource sharing  
Global resource sharing (joint meeting with Global Libraries interest group)  
Electronic content and resource sharing  
Digital rights management  
FRBR as it applies to resource sharing

