

Cyril Oberlander
University of Virginia

Speaker's Notes

for

Collaborative Strategies:

Next Steps for Service Design in Collection Development, Resource Sharing, and Communities

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Collaborative Strategies:

Next Steps for Service Design in Collection Development, Resource Sharing, and Communities



Presenter

Cyril Oberlander, Director of Interlibrary Services
Alderman Library, University of Virginia
cwo4n@virginia.edu 434-243-2282

Collaborative Strategy
What is it?

*Print Notes Pages
To see speaking notes*

Presented to OCLC
April 19, 2006

Presentation starts with a skit: I ask audience if anyone has an electronic stud detector... Matt Goldner says has one, but when I ask to borrow it, he says he can't – I am not an affiliated neighbor, but Eric knows us both, so I can borrow it through him. So I ask Eric, he asks Matt, Matt lends the tool to Eric and Eric gives it to me... I explain that this is the way resource sharing works – it was great for years, but it is time to change. If information is such a valued tool, why is it so challenging to share it. There are many people who aren't authorized to borrow books.

How tools are shared in a distributed network may be one of the most amazing accomplishments libraries have been a part of, that said, the workflow has a lot to be desired.

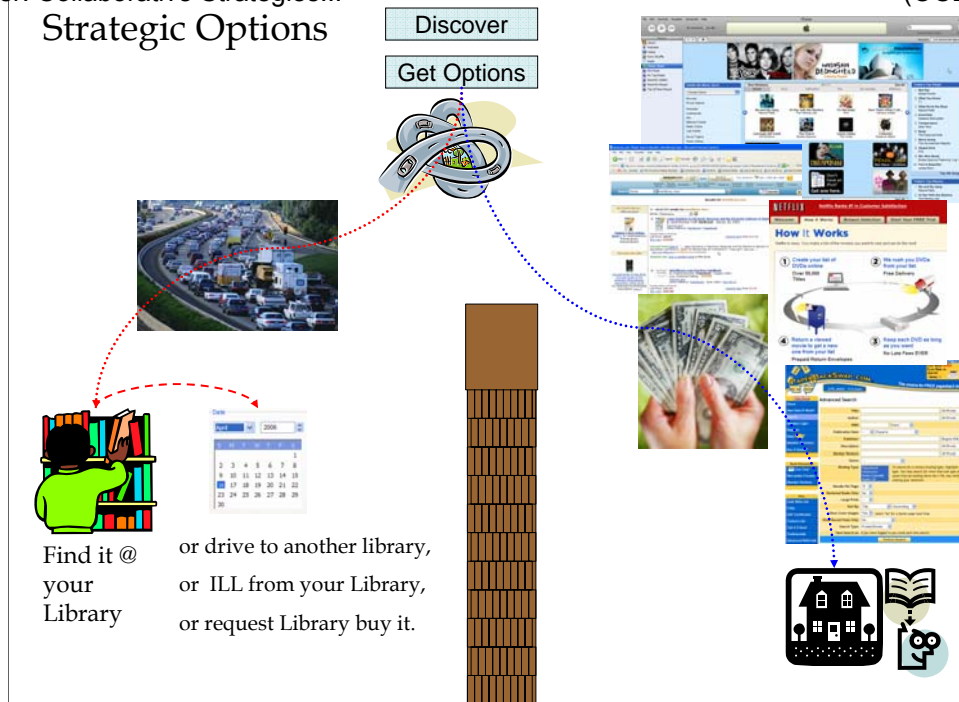
My alternative title for this talk is simply – libraries are ready for the changes ahead, we just need an off-ramp or an exit strategy. The 2004 CLIR report by Liz Bishoff and Nancy Allen "Business planning for cultural heritage institutions" underscores the need for strategic planning as a process that defines sets of problems that "lend themselves to more than one solution or course of action." Furthermore, they state that "It is critical that cultural heritage institutions be able to weigh one set of choices and outcomes against another and to follow this up by modeling business plans that can support one choice or the other." (Bishoff, p. 6)

The Environmental Scan, Information Trends, and Perceptions have helped prepare libraries for the transitions ahead, but we what we lack and struggle with is an exit or migration strategy, and the web service sufficient to be transformed. What I plan to discuss are some collaborative strategies to help us make the transition. Collaborative strategy is basically working together to define and resolve strategic problems, and I use the term generally as way of promoting strategic planning and partnerships to develop organizations and their capabilities, however, as you already know, resolving strategic problems in the current library environment involves transforming traditional functional units with new workflow and systems, and expanding our long-term strategies and partnerships.

Wanted to mention a few great examples of Collaborative Strategies: resource sharing, the creation of the Ohio College Library Center and it's migration to OCLC Online Computer Library Center, cooperative cataloging, development of OAI, open worldcat, and perhaps ... World Library Service. For better context on this topic, you might look at the article entitled "Collaboration Rules" in the Harvard Business Review; July 2005.

Today, I am sharing ideas, works and tools on the topic to date, I also see your participation in collaborative strategy making as vital, so your comments or questions are greatly appreciated.

My experience in library collaborative strategy making first started when as staff trainer, I was asked to help integrate two department's staff; reserve and circulation. I find learning a very social process, and with the real world problem of integrating two distinct units, I learned that library staff are fantastic with adaptation, provided the strategy makes sense. Whether we talk about integrating library units, distributing workflow in new ways, or creating the much feared integrated service point, the reality is that libraries are ready for change, provided we make sense out of the strategy. Sometimes that sense making is made clear with tools, such as the work of Kilgour and others that helped make cooperative cataloging online, others come from awareness and support of new business models or workflow. In starting to look at purchase on demand as a hybrid between resource sharing and acquisitions, this blurring of functional lines drawn in library traditions, what may be most important to recognize is opportunities for an organizational adventure – a journey that starts with discussions that question the known and delivers an effective unfamiliar.



A user's strategy or preference is often based on cost, & convenience factors with an increasing reliance on favorite alternative content sources.

Some alternatives are known, search engines providing websites, iTunes, Amazon, Netflix, & even a reader driven book exchange site known as paperbackswap.com.

We are less familiar with others; how do people use online communities, WIKIs, blogs, and how acceptable these alternatives are in academics, we can assume not very, however, they are a vast source of primary datasets on social knowledge. Users have many options to consider, and they weighs each with personal strategies.

One of strategic challenges for libraries and OCLC is the need to be an attractive and cost-effective option any user. (*point to left side*)

How do free videos that rely on multiple hold systems and pickup compare to 1.99 to borrow or download?

Click There seems to be a great divide between these two strategic options, not only for the user, but also for library systems – so what are we going to do about it?

Increasingly OCLC and libraries are trying to incorporate alternative sources into their tools; much progress has been made in Openworldcat with links into the library catalog and book purchasing. For libraries, the options are not as easy because they rely on an ILS system that haven't made huge strides in web services, short of allowing federated searches that mix Google scholar with MARC records of books.

Click Ironically, removing the brick wall isn't that difficult – yes it relies on new system interoperability, but library staff are ready for this, not only because they are consumers in this world too, but they also see the variety of options users can have as part of the design future for library workflow and services. In short, Library strategy is moving away from inflexible workflows to strategic options that take advantage of automating opportunities; pricing, collection building and user services, they are ready for new library web services that fundamentally change the nature of how we do business, but not what our business is.

Collection Development & Resource Sharing



What is our current strategy?

Framework:

- Who's on first
- Favorites vs. Service Channel Surfing

What is the service relationship between Acquisition, Collection Development and Resource Sharing?

It's changing...

What service model & unit functional relationships make sense?

See: ALA (2002), Levine-Clark (2004), & Holley (2005)

"for monographs, purchase may be a reasonable substitute for interlibrary loan." (Holley, 2005)

Requests for a book that a library doesn't own usually falls prey to a "who's on first" strategy:

- If the user places an ILL request, it gets filled by resource sharing using a shared circulation or ILL system
- If the user knows to suggest a title for purchase and knows that a rush service is applied to that process, then the request gets filled by acquisition using the ILS system to place an Order & Hold record.

Two or more channels, each with different entry points.

Service Channel Surfing is common to users and library staff, however experience quickly tells us which doors delivers, and those service channels (processes, tools, etc.) become integrated into our lives as favorites. Who's on first and Favorites I propose are key to the organizational transformation process in collaborative strategies. Library services such as; Acquisition, Collection Development and Resource Sharing are traditional units that

Library literature reveals that ILL is increasingly looking towards purchase on demand as a way to handle requests and budget service, similarly, Acquisitions sees just-in time acquisition as a potential key service. *Are we in the same organization?* If we examine the roles of Acquisition, Collection Development, Copy Cataloging, and Resource Sharing, we see traditional units with disparate workflow that share very similar practices and systems, and increasingly, overlapping functions.

According to the final report by UC Libraries *Rethinking How we provide bibliographic services for the Univ. of California*, "Within Library workflows and systems too much effort is going into maintaining and integrating a fragmented infrastructure. We need to look seriously at opportunities to centralize and/or better coordinate services and data, while maintaining appropriate local control,... to focus on improving the user experience."

Today, we are talking mostly about new opportunities to share workflow, some goals, expertise and perhaps even automate processes along the way.

Traditional Approach: Collection Development & Resource Sharing

Traditional Resource Sharing

- ILL borrows what it can from other libraries & some document suppliers.
- Sometimes refer ILL problematic requests to selectors: New or popular titles, Videos, News Archives, Music CDs, etc.

Traditional Acquisition

- Most monographic purchases derived from approval plan, Choice, faculty input, etc.
- Bibliographers Selection.

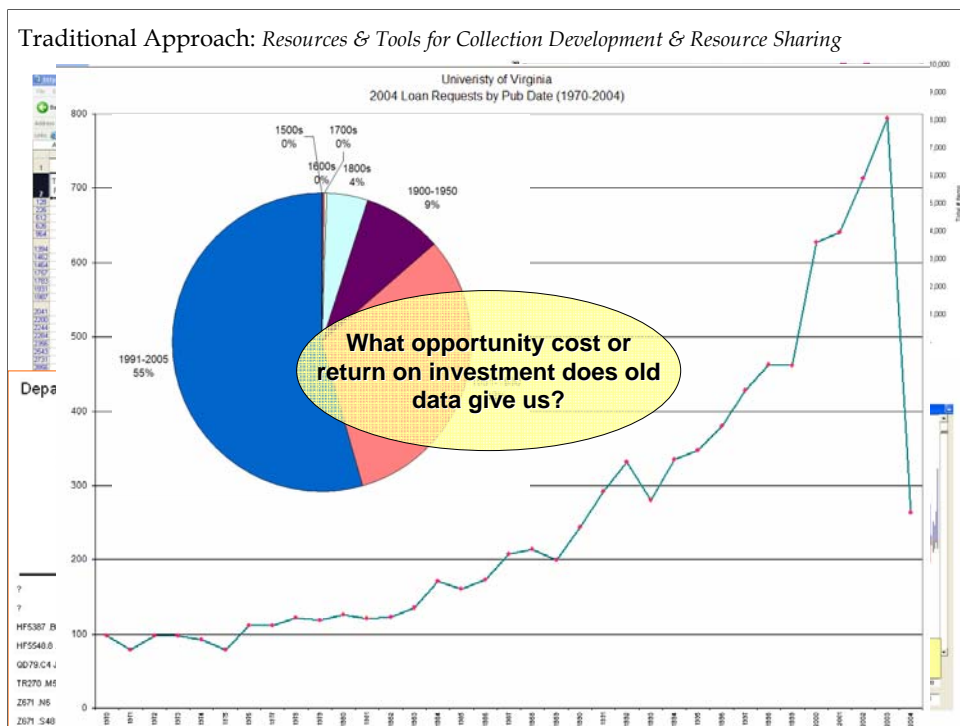
Convergence @ Collection Development

- ILL data (frequently requested titles with cost comparisons) analyzed by selectors.
- Selectors use 'what's available locally' in consortia catalogs to determine selection appropriateness.

The traditional approach involves two workflows and functional units, with a third body for decision making.

I am mostly interested in where the service convergence happens... it is centralized at selection in collection development and primarily through reports of data about trends and problematic requests.

In short, little collaborative strategy, and as a result the workflow doesn't take advantage of interoperability, streamlining, and cross-functional strategy building.



Statistical Reporting to Collection Development Examples:

- Frequently requested titles by LC using STATCAT
- Circulation, ILL, Collection Ratios by LC using STATCAT & ILS
- Requested titles by User profiles using STATCAT & ILLiad
- Regional or Hybrid Reports by LibStatCAT
- Pub Date breakdown of loan requests in 2004.

Good news; These are great indicators of use, and could be useful for trend analysis, however if decisions aren't clearly driven by use, then why report data.

Worse news; do we know what we are fishing for? & does reviewing past data get us there? In other words - has the opportunity already gone by?

Transitioning Approach: Collection Development & Resource Sharing

Not so Traditional Resource Sharing

- ILLs with purchasing pilots & specific budgets and service parameters
 - Dissertations collected for faculty and graduate requests.
 - Pilots for new books, reports, videos, foreign titles, and/or patents, making use of Alibris (within OCLC), or Amazon (outside OCLC).
 - Articles from commercial sources on accounts, or as a response to post-serial cut sensitivities.

Not so Traditional Acquisition

- University of Virginia Purchase Express.
 - ❖ Benchmarks; decision to buy in 24 hours with 90% requests filled within 7 days.
 - ❖ Scope; primarily for domestic & British imprints currently in print.
 - ❖ Videos – generally purchased if requested.

Convergence @ Collection Development, some at ILL & Acquisition

- Multiple resource allocations and purchasing channels, with experimental hybrids closely monitored and/or limited.
- Workflow not automated.

Not so traditional ILL's often involve resource sharing buying pilots that explore specified areas of interest derived from various statistical reports and organizational objectives; serving specified or limited needs, budget and user profile parameters, etc.

Not so traditional Acquisitions, similarly explores specified areas of interest.

At UVA, Purchase Express attempts to make the selection decision on any requests within 24 hours and has a 7 day turn-around time goal for domestic imprints. Scope & Metrics are critical and vary considerably. Last year, UVA purchase express obtain about 2,100 books requested by users.

Videos provide us with an important and interesting challenge, because blockbuster videos are heavily requested, how does purchase by demand/just in-time acquisitions adjust decisions and policies to these hyper-demand, low duration request behaviors.

The transitioning approach is a common change management strategy that incrementally resolves resources and services, however, resource allocation competition and process control issues often limit the potential for a more collaborative strategic response to the fundamental question; one of our users wants something we don't have, what is best for this user, the library and this situation?

Transformed Approach:

Collection Development & Resource Sharing

"Get Info Service" A new blending of systems & workflows: Acquisition, Collection Development, Resource Sharing, Reference, Vendors & World

Get Info Service starts with smarter hybrid ILL/ILS systems, workflow that:

- Automates price queries to inform user and staff
- Automates parsing based on user, local, and global criteria
- Manages requests and workflow as a web service in a new and distributed way

Convergence @ User Discovery, through Request, & into Library Collection Building Profiles

Strategic handling and parsing of requests according to user and library needs, intelligently allocating appropriate financial and functional systems and resources.

What is a transformed approach? How would we know it if we see it? Let's define what smart library systems mean...

Improving alignment of library resources and services in context to need, sounds well and good, and maybe a new label like Get Info Service might help, but what constitutes a transformed approach?

Is it automated price quote searches and approval plan links in the ILL system?

Is it exporting Item, Order and Hold record into the ILS system by the ILL management system?

Is it a blending of perspectives and processes between acquisition, resource sharing, and selection?

Let's take these one step at a time...

Transforming Approach: *Streamlining options...*

To borrow or to buy...can the answer be automated?

Smarter systems automate price comparisons & selection parameters

The screenshot shows the OCLC Resource Sharing (WRS) interface. At the top, there are tabs for 'Search Requests' and 'OCLE Resource Sharing'. Below that, there are navigation links like 'Save Changes', 'Cancel Request', 'Route', and 'Leave Request'. The main content area is titled 'How can OCLC help?' and features a search bar with 'Find in a Library' and 'WWW' options. A search for a book by Lee Andrew Hilyer is shown. The book details include 'Type: English - Book', 'Publisher: Binghamton, NY : Haworth', and 'ISBN: 0789019515 0789019507'. A yellow callout box with an arrow points to the 'Ready to Buy?' section, which displays the book cover and pricing: 'Best Price \$24.94 or Buy New \$30.00'. Below the callout, there are tabs for 'Libraries', 'Details', 'Subjects', 'Editions', and 'Reviews'. At the bottom, there is a table with columns for 'Item', 'Author', and 'Shelf'.

Kyle Banerjee, Alibris and I have worked on a scripted solution in ILLiad that automates the search for the cost of a book before any mediated searching of possible lenders. Next, how about making the script search collection building profiles – some libraries are ok with purchasing items requested by users outright, but others want to target purchasing within parameters, limits; publisher, cost, etc.

Currently, Open WorldCat already offers automated price searches to users at point of discovery – why not build this same functionality into WRS and ILLiad. In fact, an important theme to get from this discussion is that by empowering the user with options and preferences at point of discovery, we should also similarly empower our library staff and workflows to take advantage of the same options and preferences.

Transforming Approach: *Exploring cost & collection building benefits*

Automated cost lookup expands options and promotes organizational understandings of real cost benefits of collaborative strategies

What does ILL, Purchase on Demand or Just in Time Acquisition data say...

- In 2002, Univ. of Wisconsin ILL reports purchasing books at an average cost of **\$36.86** and received on average in **8 calendar days** for domestic imprint, **31 days for foreign**. Thomas Crane Public Library ILL reports that in 2001, the average cost was **\$17 per title** and received in **16 days**. (ALA, 2002)
- Robert Holley & Kalyani Ankem's study of the out of print book market claim a 95% availability rate of sample monographs. (Holley, 2005)

Top OCLC ILL Requests 2004 - Alibris data prepared by Aric Rubin, Alibris

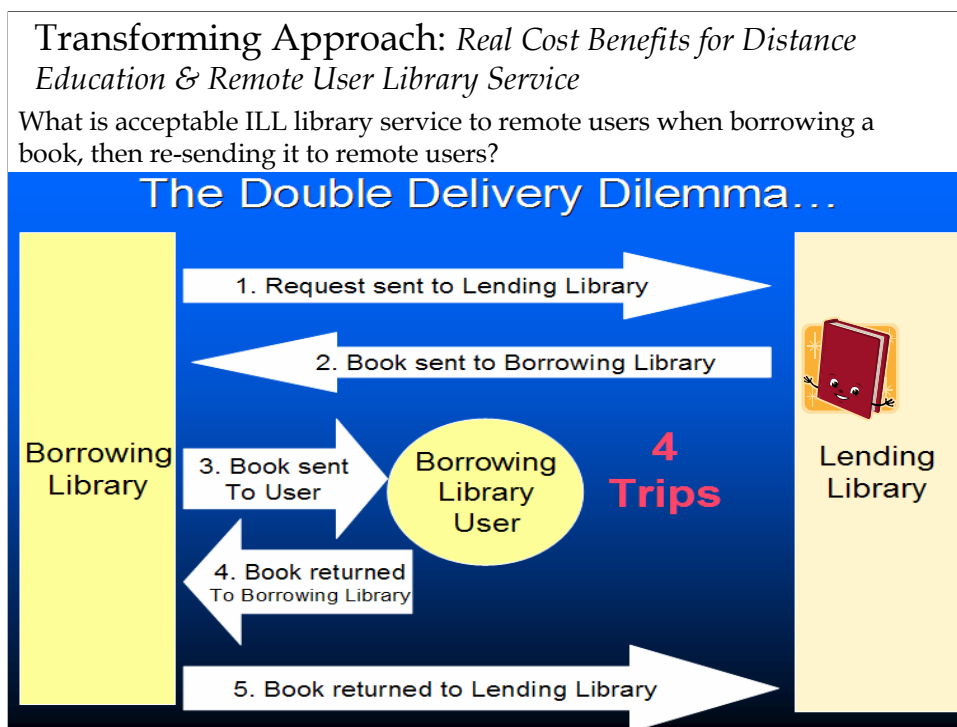
Title	# Requests	# Used Titles Available	Lowest Price for Used Title	Price for New Title	New Title Availability
DA VINCI CODE : A NOVEL /	3187	185	\$8.95	\$18.95	yes
NEW SOLDIER.	1855	7	\$499.90		no
DOYLE BRUNSON'S SUPER SYSTEM : A COURSE IN POWER POKER /	1815	26	\$19.30	\$20.97	yes
ANGELS & DEMONS /	1623	33	\$2.95		no
SOUTH BEACH DIET : THE DELICIOUS, DOCTOR-DESIGNED, FOOLPROOF PLAN FOR FAST A	1307	61	\$12.75	\$14.77	yes
SECRET LIFE OF BEES /	1197	146	\$5.45	\$9.80	yes
WOMAN WITH THE ALABASTER JAR : MARY MAGDALEN AND THE HOLY GRAIL /	1139	18	\$8.45	\$11.87	yes
PURPOSE-DRIVEN LIFE : WHAT ON EARTH AM I HERE FOR? /	1090	109	\$6.75	\$13.99	yes
POWER VS. FORCE : THE HIDDEN DETERMINANTS OF HUMAN BEHAVIOR /	1052	25	\$11.95	\$10.47	yes
FREE MONEY TO PAY YOUR BILLS /	952	4	\$33.70	\$34.16	yes
DIGITAL FORTRESS /	909	189	\$2.95		no
PLAY PIANO IN A FLASH /	905	8	\$22.42	\$8.71	yes

Cost Benefit analysis is a very peculiar process, as many of you may know. How do we determine the cost of a reference interview or circulation transaction?

On one level, it's easy to calculate the cost-benefit of an ILL or acquisition, rarely however, does it take into account the benefits such as sponsored grants, publishing and tenure.

By discussing and understanding cost-benefits as an organization of various distinct units, we can better understand and align our services around shared goals; customer service at individual and institution level, collection building targets, streamlining interoperability, etc.

This chart was made by Aric Rubin from Alibris, it shows the top OCLC ILL requests in 2004 with used book prices and availability.



Distance education and remote library users services are great topics for a discussion worth having as a collaborative strategy, primarily because of the cost and difficulties in reaching users. The cost to borrow and send an ILL book to a remote user is very prohibitive, however...

Alternatives such as purchasing books make sense both for cost and turn-around times.

Now, I am not necessarily saying that we need to collect books ILL buys... we can let the selector decide that after the book is returned.

Transforming Approach: *Options for Articles*

Automate purchasing articles on demand

Process Copyright

TN	Journal	Article	Volur	Incluzive	Pages	Year	Username	Archive	Copyright List
72030	AQUATIC CONSERVATION MARIN	A golden que of river restoration	14	6	543-549	2004	ehongh	...	...
72048	Ethnic and Racial Studies	Teaching Ethnic and Racial Rel.	26	3	511-516	2003	jinbachei	BMJ	...
72045	Ethnic and Racial Studies	Sociology and the teaching of a.	26	3	503-510	2003	...	...	...
72031	Neurotoxicology	Predicted Mercury Concentrat...	22	5	681-697	2001	...	...	...
72029	WATER QUALITY RESEARCH JO...	Development of a Wet Weather...	39	4	417-431	2004	...	...	...

Button appears if:

- Publisher-ILLiad interoperable or
- Opens publisher journal website

Interoperable means...

PDF downloaded into ILLiad

Delivered to Web

Automatic Patron Notification
Payment on Account or IFM

If we have to pay copyright of \$33 (this example), plus any lender fees and turn-around times...

Then why not purchase the article directly from the publisher through ILLiad or the ILLiad-CCC Gateway?

SCIENCE @ DIRECT

Register or Login: user name

Home Journals Books Abstract Databases My Profile Alerts

Quick Search: within This Volume/Issue Go

NeuroToxicology

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Volume 22, Issue 5, Pages 555-724 (October 2001)

Save Copyright Payment Information

Besides purchasing books; why not automate article purchasing?

Increasingly, the option to buy articles is faster, allowing almost immediate delivery of high-quality articles from the publisher, even Amazon sells some articles for \$5.95.

One reason to consider this option is that if you are requesting the 6th article from the same title, and the all the citations were published within 5 years, you will pay around \$30 in royalties, not including lender charges, etc.

What ways can OCLC broker purchasing articles on demand from publishers, or aggregators?

Transforming Approach: *Collection Building Targets*

Process matters... **communication** is key to a collaborative organizational development of a strategy, while **automation** is key to a scalable workflow.

UVa Collaborative Strategies taskforce started by asking if we can create a **machine readable Collection Building Profile** that can target, parse or resolve just-in time acquisition, buy on demand and resource sharing services. Targets may include:

User & Use Profiles

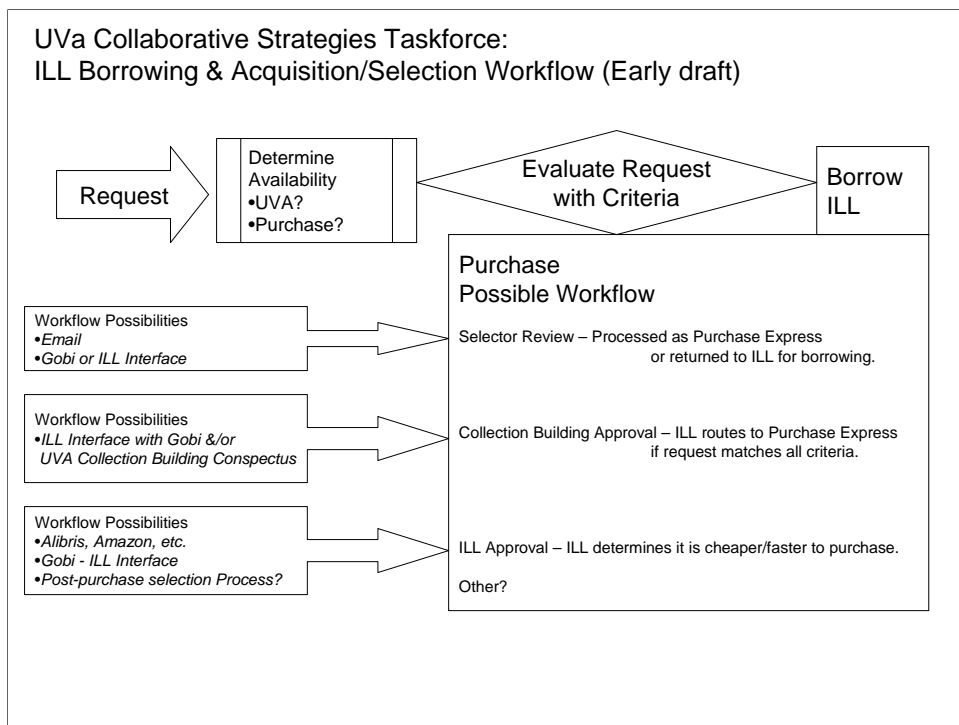
User Needs (Remote User, etc.)
 New Department or Program
 Crisis Management/Situational
 Collection Use Ratios
 Others?

Item Profile

Condition
 Cost
 Format
 Language
 Subject (LC#, etc.)
 Others?

The idea of building smarter systems that take advantage of multiple options and helping us build strategy is not new – but we are talking about taking resource sharing and approval plans one step beyond. Because we are talking alignment and boundary spanning, specifically; Interlibrary Loan, Acquisition, Collection Development, Distance Education/Remote Library Services and digitizing production services, chances are the dialogue and exploration takes plenty of talking, time, and trust.

At UVa, we formed a taskforce; Collaborative Strategies to examine the ideas of converging some requests that fall within automated parameters. This process started with getting to know our processes and perspectives, and continues with looking at how might we transform our multiple workflows. Discussing the variety of perspectives and processes is important to process.



One of our early decision tree's that looks at possibilities: Evaluating requests in a workflow that interfaces with goals and systems isn't rocket science, but while system interoperability and proprietary barriers seem challenging, the real challenge is transforming how functional units move from current practice, into transitioning and transformed practices. It helps to think in terms of library systems and workflows as having Exit strategies. The early proposal met with support and interest, the final proposal is due next month.

ILLiad Borrowing: Examples of criteria in workflow

The screenshot displays the ILLiad interface for a loan request. Key sections include:

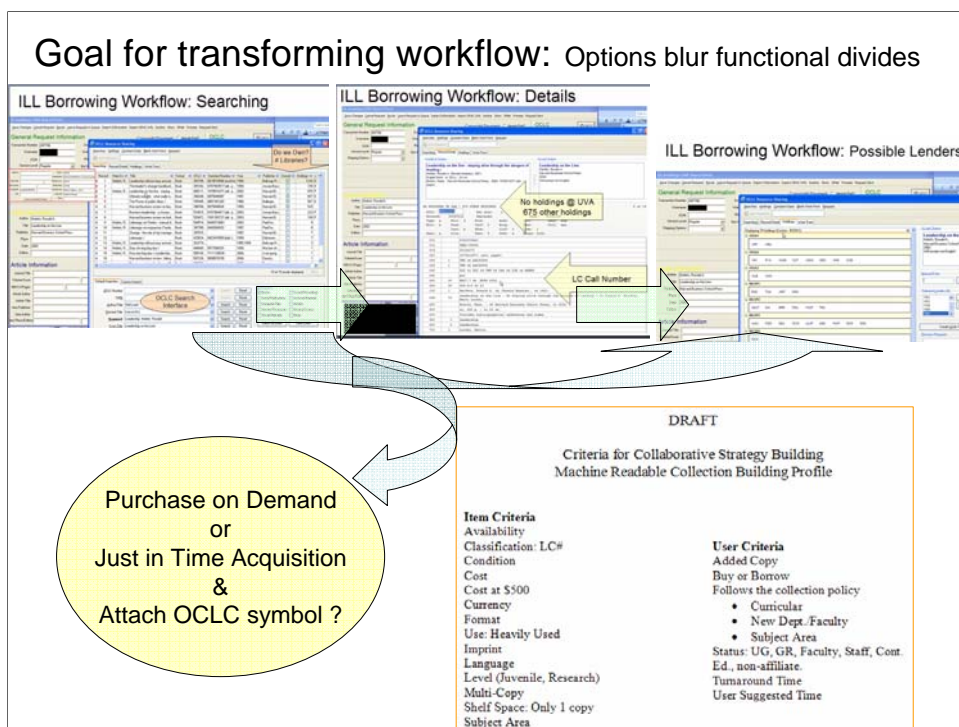
- General Request Information:** Transaction Number 437786, Username, ISSN, Service Level (Regular), Shipping Options.
- Loan Information:** Author (Heifetz, Ronald A.), Title (Leadership on the Line), Publisher (Harvard Business School Press), Place, Date (2002), Edition.
- Article Information:** Journal Title, Volume/Issue, MN/yr/Pages, Article Author, Article Title, Item Publisher, Item Author, Item Place/Edition.
- MARC Record:**
 - 010 00 000000420
 - 011 00 02A2-Y8964
 - 019 00 80102272
 - 020 00 1570514971 (alk. paper)
 - 029 1 000 5b hA2Y8964
 - 029 1 000 5b hA238888
 - 040 00 DSC 5d DSC 5d WDH 5d CDF 5d LVB 5d BAKER
 - 042 00 gpc
 - 050 00 0007-7 4b .H399 2002
 - 052 00 303.2/4 42 21
 - 100 1 Heifetz, Ronald A. 5q (Donald Abertson). 5d 1951-
 - 245 10 Leadership on the Line : 4b staying alive through the dangers of leading / 5c Ronald A. Heifetz, Harty Linsky.
 - 246 00 Boston, Mass. : 5b Harvard Business School Press, 5c 2002.
 - 300 00 5b, 252 p. . 5c 24 cm.
 - 504 00 Includes bibliographical references and index.
 - 650 00 Leadership.
 - 655 00 Leadership.
 - 700 1 Linsky, Martin.

Annotations on the screenshot:

- No holdings @ UVA 675 other holdings:** Points to the MARC record.
- LC Call Number & plenty more:** Points to the MARC record.

So that everyone can get an example of how might criteria be pulled from the ILL request processing.

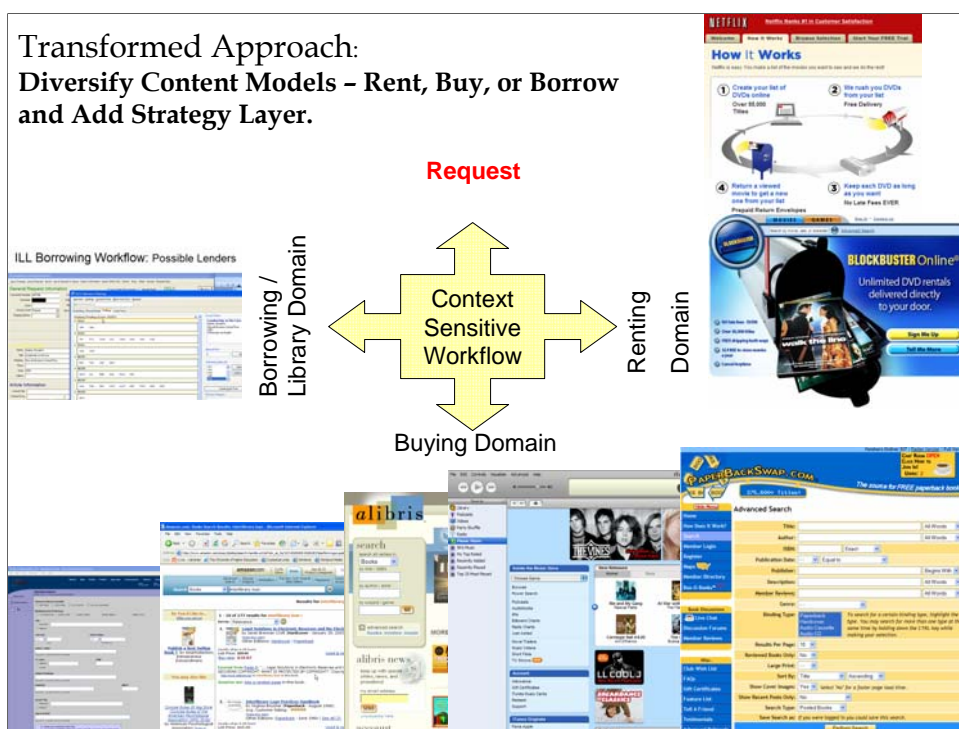
This screenshot illustrates interaction with the MARC record and holdings data invaluable to machine readable processing.



Explain flow...

As we explore developing more options and capabilities for ILL request workflow with links to purchasing, acquisition systems, we even see opportunities to continue the functional blurring into cataloging;

The transforming workflow is an entirely new system, one that might change not only processing requests, but also functional units.



At the heart of a smart transformed system are tools that help us deliver the best options to both users and the library, with workflows that automates as many of the possibilities with sensitivity to context and strategies such as collection building profiles, etc.

Netflix and iTunes both offer membership to associations – can OCLC offer libraries subscriptions to these services to reduce the problems of borrowing A/V?

While pondering all the options, part of the context sensitive workflow has to take into account delivery preferences, content options, etc. Notice that ideally, the staff interface isn't much different than discovery options the user have. So how do we bring about these options? Can we create optional channels of service, much as an RSS feed behaves in a web portal?

Current Discovery Options



Find in a Library with WorldCat

Search: Find in a Library Web powered by **YAHOO!** SEARCH

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Enter postal code, state, province or country

Narrow Your Results by Format: Choose Library Profile

Displaying Libraries 1 - 2 out of 2 for Local

1. [Eastern Mennonite University](#) Harrisonburg, VA 22802 41 miles
 [VHS tape](#)
2. [Longwood University](#) Farmville, VA 23909 53 miles
 [VHS tape](#)

*Distances, where provided.

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I need it by...

My Library
University of Virginia Libraries

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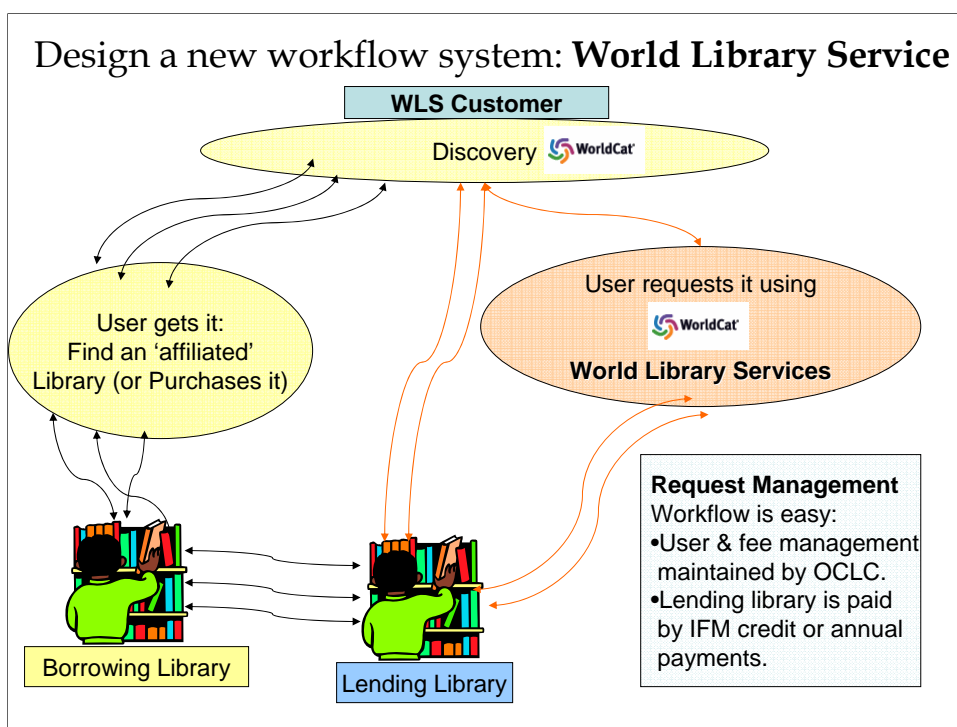
- [Find this @ UVa Libraries](#)
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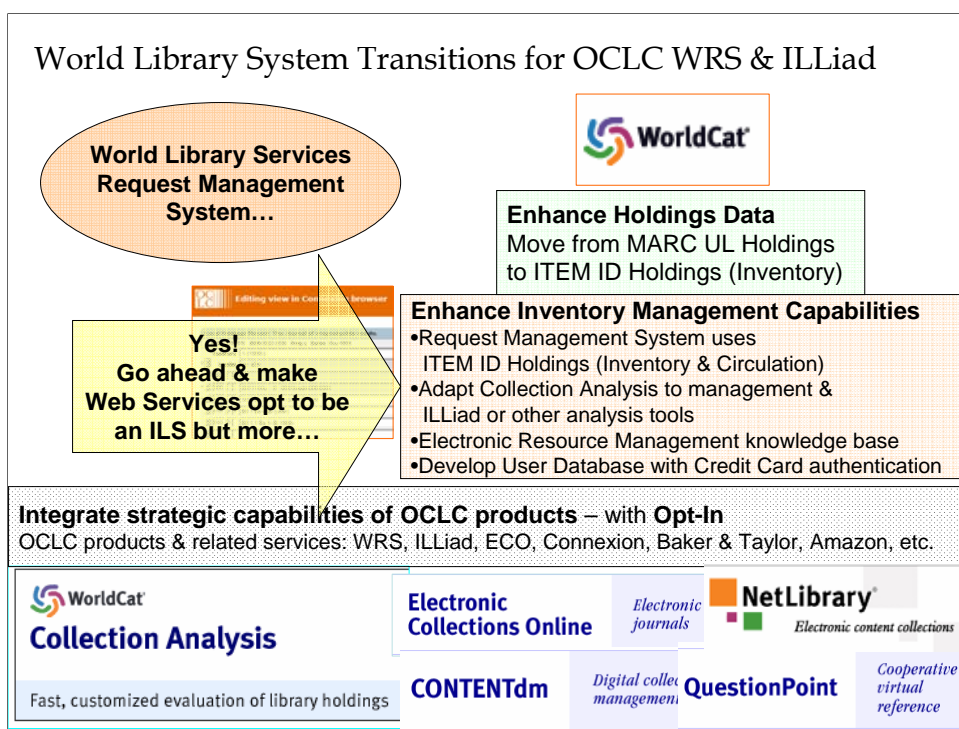
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Remember the stud finder, it's easy to imagine a new workflow that allows direct lending to users who find materials in Open Worldcat to providing the types of services allowable; could be from open worldcat, they want to purchase a book, however, if they knew that WLS could lend and ship them a book for \$5, \$10, or \$15; participating WLS member libraries probably will have varying lending charge price, that said, keeping it low is essential to making this compete with purchasing and iTunes models.

In fact, WLS customers who identify affiliation with borrowing WLS member libraries might even subsidize the lending charges, and a WLS customer probably has at least two affiliations; a public and academic library, or perhaps even a company sponsor.



So how do we get there...

Libraries are ready, we have confidence that OCLC can initiate and implement this kind of tool, with successes of New first search, connexion, WRS and open worldcat.

OCLC World Library Services can provide options;

- Opt in with full suite of web services
- Opt in with interactivity between ILS, or ideally OCLC promotes some of the open source ILS options now available such as koha.
- Libraries can write own interface to OCLC WLS

Transforming Library & OCLC means Web Service Convergence, Collaboration & Communication

Connect strengths & workflows of various units into a web service framework that changes how we cooperatively do library work.

Service convergence possibilities aren't limited...

- ILL & Acquisition integrate strategies that include borrow, rent, & buy.
- ILL & Cataloging develop shared workflows.
- ILL & OCLC increase the use of library collections by expanding library service beyond affiliation to a borrowing library.
- OCLC web services offers integrated library system services.
- Automate lending of articles from electronic resources using 008 for licensing restrictions and DOI for locating objects.
- Expand the use of Odyssey as article scanning tool, to also provide optional delivery of articles to a public domain repository that automatically incorporates the contributions combined with the ILL citation.
- Develop a collaborative strategy for dealing with the increases in grey literature requests.

Collaborations work very well to resolve strategic problems because problem solving are best resolved when various strengths at an organization are employed. I have already mentioned the first three, but other opportunities exist that I want to mention:

How about using the 008 field for electronic resource licensing restrictions, and incorporating DOI as a way to automate ILL lending of articles requested through OCLC?

And can we adapt Odyssey and ILLiad to recognize when a article being scanned for another library is within public domain, and a second copy is sent wrapped in the bibliographic citation to a global repository? If so, let's add Odyssey into WRS.

Since about 2000... PRE-1923 requests at UVA...

2,982 copies we borrowed

16,950 lending items, 11,210 were articles we copied/scanned

635 LEO articles we copied/scanned

Finally, developing a better strategy to understand, request or collect grey literature or unpublished materials, not because they are harder to find, there are simply more often cited and requested by users and are indicative of a shift in research interests away from collection approval plans and selection practices.

Collaborative Strategies isn't just workflow

Provided we are on road to a new workflow with WLS, we can double our efforts on other collaborative strategies:

- Staff Education & Training
- Communication
- Exit/Migration Strategies
- New community roles

I want to briefly add that collaborative strategies isn't just about new workflows, new web systems, it's trying to work together in new ways to reach our users, both internally within the divisions of our library, and externally with other libraries and content and service providers.

Staff Education

OCLC Online Computer Library Center
a worldwide library cooperative

An OCLC Initiative
WebJunction
A Web-based community helping libraries meet their technology and training needs

Atlas Community Portal

April 25, 2006, 06:18:23 am

Welcome, **Guest**. Please login or register.
Did you miss your activation email?

Atlas Community Portal • ILLiad • Training »

BoardTools

[1]

Syndicate

QuickJump

-> Training

Generating Reports in OCLC ILLiad class onsite at Washington State University
Started by Stephanie (0 Replies 206 Views)

OCLC ILLiad Training Update – New online reports class
Started by Stephanie (0 Replies 278 Views)

Topic you have posted in

Normal Topic

Hot Topic (More than 15 Replies)

Very Hot Topic (More than 25 Replies)

Locked Topic

Sticky Topic

Poll

UserTools

Home
Help
Search
Calendar
Members List
Statistics
Login
Register

Current
Change
(Choose color)

Latest News

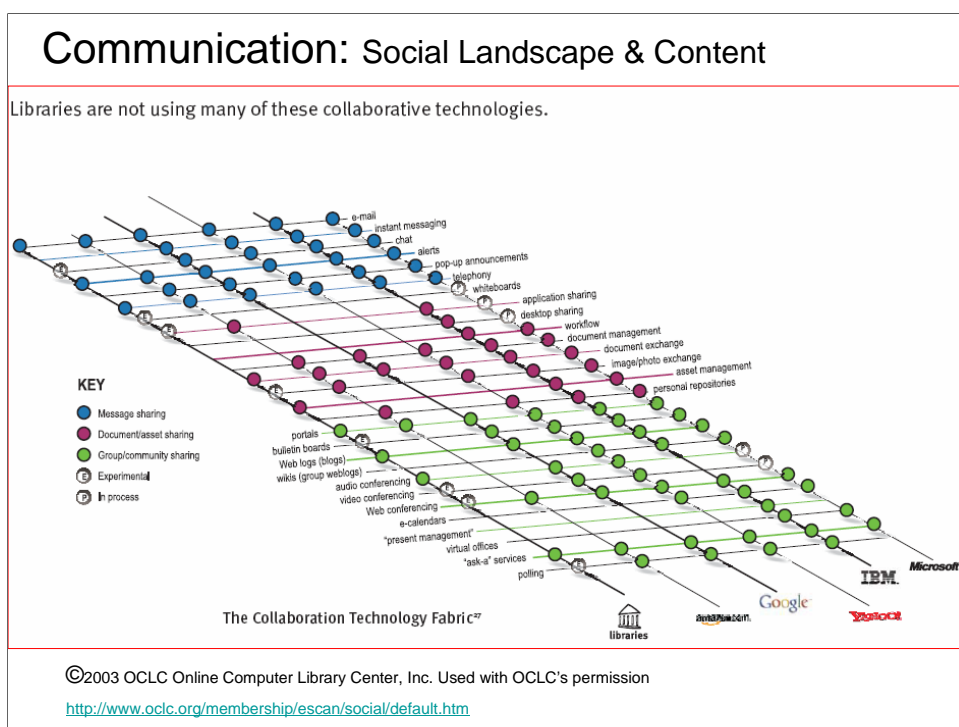
Forum Stats

123 Posts
81 Topics
332 Members
Latest Member: cubite

Staff education and training is one of the most critical pieces in transforming libraries and OCLC, however, it would also take another presentation to do so, suffice it to say that it is critically important that we find better ways to design and deliver development programs to our staff to prepare for emergent tools and workflow. Want to give credit to some significant progress made on collaborative strategies from OCLC with WebJunction and Atlas Systems for their Community Portal – these online learning communities are a great start, however, the challenge inherent in these online learning communities is gathering enough members and their contribution to make the environment vibrant for its members; again, the issue of getting into the user's channels. Like to mention a couple of others; Blended Librarian and Open Source for Libraries. With these and many other learning communities; how we weave them together is an art we need to get better at.

Besides a very progressive and robust training program at UVA, we are building an interactive high-tech conference room in my office to develop training that ranges from the basics; MARC, finding electronic resources, and bibliographic verification offered as a certificate for the ILS staff, but also training for the latest technologies, such as VOIP, Google Book Search & Google Scholar, etc. We have also started a series of library tours to invite staff from various library units to meet with other staff from other libraries, see different workflow in a neutral area, and get to know each other. Lastly, we are designing new national forums, building on my experiences with starting the western ILLiad users meeting, UVA will hold a scanning forum that combines various library's needs for scanning with various industry practices in a conference with vendors that attempts to solve some strategic problems in scanning; automated quality controls, speed and accuracy in workflow.

However, I want to return to the topic of Communication, which plays not only an important role in how to build collaborative strategies, but also how to develop a very effective world library service web service.



The 2003 OCLC's Environmental Scan illustrated where libraries are in comparison to collaborative technology use.

That being said, I propose that OCLC add communication functionality to WRS, policies directory, and OCLC ILLiad, specifically add a Voice over IP component to its system, such as using Skype, so that we can make some progress on this chart.

Voice over Internet Protocol (VOIP) Skype – one example

The screenshot shows the Skype website interface. At the top, there is a navigation bar with the Skype logo and links for Home, Download, SkypeOut, Shop, Share, and Help. Below the navigation bar, there is a promotional banner for SkypeOut global rates, stating: "Call more friends on SkypeOut global rate" and "We've included new destinations in our SkypeOut global rate so you can call more friends in Korea from \$0.021." Below this, there are links for "Check out our latest rates" and "Remove notice".

The main content area features two large promotional boxes. The left box is purple and titled "Now with free video calling", featuring a video camera icon and the text: "Say hello, smile or even wave to anyone, anywhere in the world." The right box is blue and titled "Get 120 SkypeOut minutes and free Skype Voicemail when you buy Skype products for \$10 or more using PayPal." Below this, there is a "skype & PayPal" logo and a diagram showing a laptop connected to a telephone icon, with the text: "Call anyone on any phone anywhere in the world, at local rates. Get SkypeOut".

How many people currently use Skype, Gizmo Project, or another VOIP technology?

VOIP offer a variety of new tools useful for the kind of distributed work we do; especially if we want to move towards world library service. Already, Interlibrary Loan shops around the world are spending a lot of money on long distance calling.

The future of Libraries & OCLC depends on getting the Library & OCLC into user channels

Exit / Migration Strategy
Develop a new Library Service Model that offers value:
Is World Library Service enough?

What does it take to be a favorite?

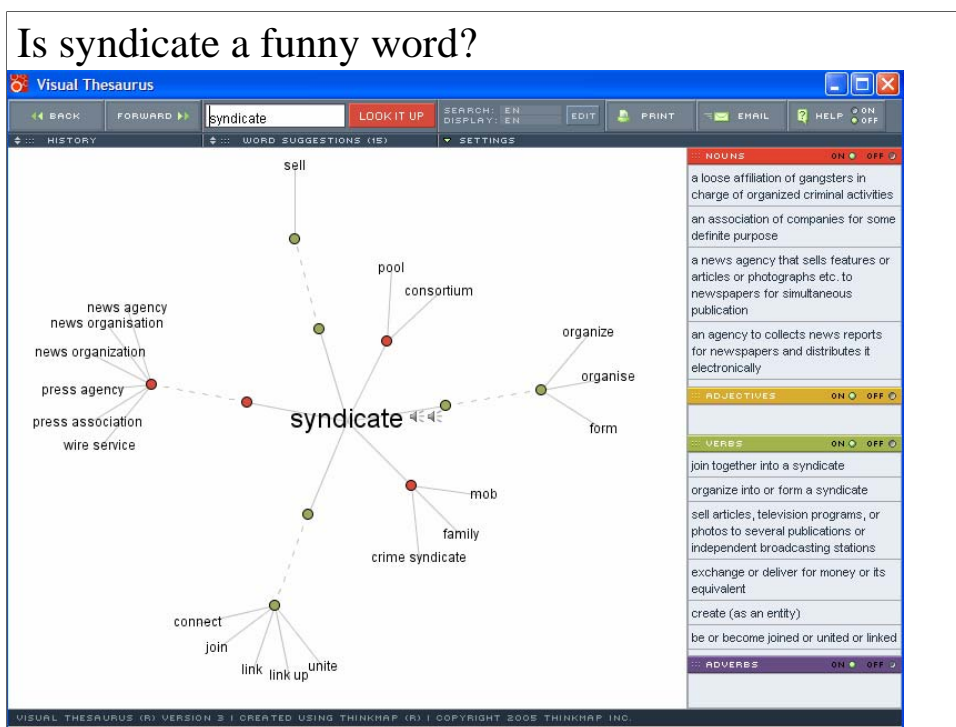
Library systems as space and service need to find ways into user channels if it wants to have a new strategy.

How we syndicate library service depends on how attractive our collaborative services and library system can be – if they don't add value, I don't want them on my Google channel. How many people use RSS feeds and have tailored their Internet views?

The new library self-service model has less to do with designing the best web page, as it does developing better service that feeds into the tools our users want to be in, or hosting the tools and communities they want. Academic, Public, Special and Medical libraries are all looking for their future in the research and learning environments, and the community, however, strategically redesigning our functions internally and externally relies on collaboratively redefining of what our service is.

As I mentioned at the start of this presentation, users have so many channels to choose from now, renting, buying, or borrowing all are evaluated from the users preference and needs.

So, Is World Library Service and OCLC web services enough? Probably not... we can't forget a couple of important factors in collaborative strategies; first, what's the purpose, and second, do we agree on shared goals?



Libraries must deliver near marketplace expectations, although we see search engines as our competition, even wikiversity and commercial learning are a source of new competition for higher education and learning.

Libraries have exceeded marketplace expectations in quality of content, just not delivery. I use syndicate to think of delivering our collections and services in terms of an RSS feed, but also exploring the recognition that we may need to recognize ourselves as like an association of companies for some definite purpose - learning and research. Increasingly with consortial purchasing and catalogs, value is attributed to libraries as groups. As a distributed learning organization, we are migrating from cooperative cataloging and resource sharing, to licensing and repositories and beyond.

OCLC has provided lots of insight into the information landscape, but to change practice, fundamentally our service framework needs to expand beyond individual libraries.

Extreme makeover starts with community

Lorcan Dempsey's very interesting weblog on Networkflows says...

"Historically, users have built their workflow around the services the library provides. As we move forward, the reverse will increasingly be the case. On the network, the library needs to build its services around its users' work- and learn-flows." <http://orweblog.oclc.org/archives/000933.html>

We are in the business of...

Libraries as service to communities:

- What is it?
- What it isn't?



As we are busy remaking ourselves...

We discover the task isn't just creating a new identity or marketing strategy to users, it's convincing ourselves to entirely redesign the internal and external workflow, economy and ultimately, the relationship with our communities.

So I would ask us to consider how we finish the statement; we are in the business of...

If Perceptions of Libraries has an accurate snapshot of how users perceive it, then we have our answer – but it isn't an answer we have to live by.

U.S. Department of Education – Latest Commission Reports, Gerri Elliot Dec. 8, 2005 report on the Future of Higher Education... Cites Microsoft's philanthropy as improving life-long learning for disadvantaged youth and adults through community-based technology learning centers. Gerri states: "We believe that publicly accessible gathering places represent prime locations where people can go beyond merely having access to technology and can acquire the skills to use technology effectively to help themselves and their communities."

I argue that libraries in redefining their business need to focus on developing better learning environments, in particular connecting with communities; these can be the communities they serve, however, they can also be the research concentrations of their collections or areas of study.

Community Relationship: Building Identities



BBC website has more than two communities, this is just two examples, one for the UK community, the other for the international community.

Community Strategies

SWEDISH LIBRARY'S LIVING LOANS

18.8.2005 10:03:26

A Swedish library has adopted a novel approach to the challenge of breaking down negative stereotypes by offering borrowers the chance to loan a living person.

In a fresh twist to the idea of being 'on the shelf', the Malmö Library in southern Sweden will make available nine new additions to its collection over the weekend.

"Maybe not all journalists are know-it-all and sensationalist, just unafraid and curious. Maybe not all animal rights activists are angry and intolerant, but intelligent and committed," said Ulla Brohed, the coordinator of the living library scheme.

"You sometimes hear people's prejudices and you realise that they are just uninformed," Ms Brohed said.

The 'items' on loan will include an imam, a journalist, a Dane, a homosexual, a Muslim woman and a member of the Romany, or Gypsy, community.

The 'Borrow a Bias' project will give borrowers 45 minutes to confront the prejudice of their choice in the library's outdoor caf—

It is not clear whether the library will impose late-fees if borrowers are late returning their loans.

"It's a fun idea. Prejudice is something you have when you don't know each other. If you confront each other, then the prejudice is broken down," Lillian Simonsen, the Dane who will be on loan, said.

"We would like to test whether there really is such a difference between Danes and Swedes, as many people believe," Ms Brohed said of Lillian Simonsen's involvement.

The librarian said the Danes and Swedes have too little contact and that people living in the north of Sweden tended to find the Danish language incomprehensible, according to a report on the Danish Foreign Ministry's official Denmark website.

Can we identify some strategies libraries can adopt, build and develop communities?

Public libraries have had an excellent track record in this practice.

One of my favorites is the idea of lending people, sort of get to know someone; community as collection, every person a book...

The collage consists of three overlapping web pages. The top-left page is titled 'Learning environments' and features the 'KnowledgeWeb Project' logo. It includes a 'Welcome' message, a 'Mission' statement, and a 'Navigation' menu. The top-right page is 'infed', with a 'welcome' message and a search bar. The bottom page is 'Wikiversity', which has a 'Welcome to Wikiversity' message, a 'Main Page' section, and a 'Navigation' menu. The Wikiversity page also features a 'Contents' list and a 'Our Mission' statement.

How many have used wikipedia, looked into a wiki book, or seen other examples of online learning environment?

What do these have in common that libraries should pay attention to?

How have they impacted our community, research, etc?

Learning Communities & social networking are everywhere

PBS TeacherSource Be more resourceful. PBS

Find 3,000's free lesson plans and activities

SEARCH [input] Go

SEARCH options

BBC NEWS International version | About the versions | Low graphics

Last Updated: Friday, 24 March 2006, 18:07 GMT

E-mail this to a friend | Printable version

Japanese comics go mobile

By Richard Taylor
Editor, BBC Click

From texting to surfing the Internet and making video calls, the ways in which mobile phones can be used seem to be ever expanding. In Japan, another string has been recently added to the mobile bow with the launch of electronic books and comics specifically for phones.

Two-thirds of Japan's population - about 120 million people - are using their mobiles in ways which would make the rest of us gasp in astonishment.

at. Let us

the PBS ic formats

Home Issues and Advice Fun and Games TV Programs My PBS Parents Site C

Fun and Games

Activity Search

Select from one or more of the menus below:

Pick a program
Program [dropdown]

Pick an activity type
Activity [dropdown]

Today's Activity from PBS KIDS

Clifford The Big Red Dog

Have Respect ClickTale

Wild Republic

Teachers' Section

New Lesson Plans For TagWorld

Author/Title	Implementation
Elizabeth A. Shalheim Advanced Math.Pk.2.2	Elizabeth A. Shalheim Implementation.Pk.2.2
Advanced Math.Pk.2.3	Implementation.Pk.2.3
Advanced Math.Pk.2.4	Implementation.Pk.2.4
Advanced Math.Pk.2.5	Implementation.Pk.2.5
Advanced Math.Ak.1.1	Implementation.Ak.1.1
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Advanced Math.Ak.1.100	Implementation.Ak.1.100

Supporting Basic Elementary English - Lesson Plans

Tagging

Building the Social Web

Mobile romance

but when you've got shorter stories, comic books, manga, anime, the colour design, something you can actually look at as well as read a story along with it, it's a great way to spend your morning commute.

Wild Republic – sells stuffed animals and following the website on the tag, you find a learning environment provided by the Audubon

Now I am not saying libraries need to be selling small stuffed animals, but being at the center of learning is vital to our future, as well as meeting the needs of our community. But What is our long-term relationship with our community? ALA says reading.

How many have read “Reading between the Lines: What the ACT Reveals about college readiness in reading”?

According to the report, only 51% of 2005 ACT-tested high school graduates are ready for college level reading.

Research & learning communities: SourceFORGE, Grid.org

The screenshot displays two overlapping web pages. On the left is SourceForge.net, showing a navigation menu with 'My Page', 'Projects', and 'Support'. The main content area features a 'Project News' section with links to 'ClamWin Free Antivirus 0.86.1 Released', 'Portable FileZilla 2.2.15a Released', and 'RDP platform 0.5.4 released'. A 'Join Grid.org Now' banner is also visible. On the right is the Grid.org website, featuring a blue header with navigation links: 'about us', 'projects', 'stats', 'member services', 'forums', and 'help'. The main content area includes a 'What is grid.org?' section, a 'How it works' section, and a 'Join grid.org and make a difference.' section.

SourceForge.net is the largest OpenSource software development website, acting as a central long-term repository or content manager of Open Source code and applications, but it also is a learning and sharing community of knowledge. Over 100 thousand projects in this repository with lots of bulletin board like communications around projects, much like service Q&A, alerts, updates, etc. Vibrant collaborative communities such as these and their technologies are very interesting to consider as models when thinking of the future of our institutional learning environments, and our library databases and services.



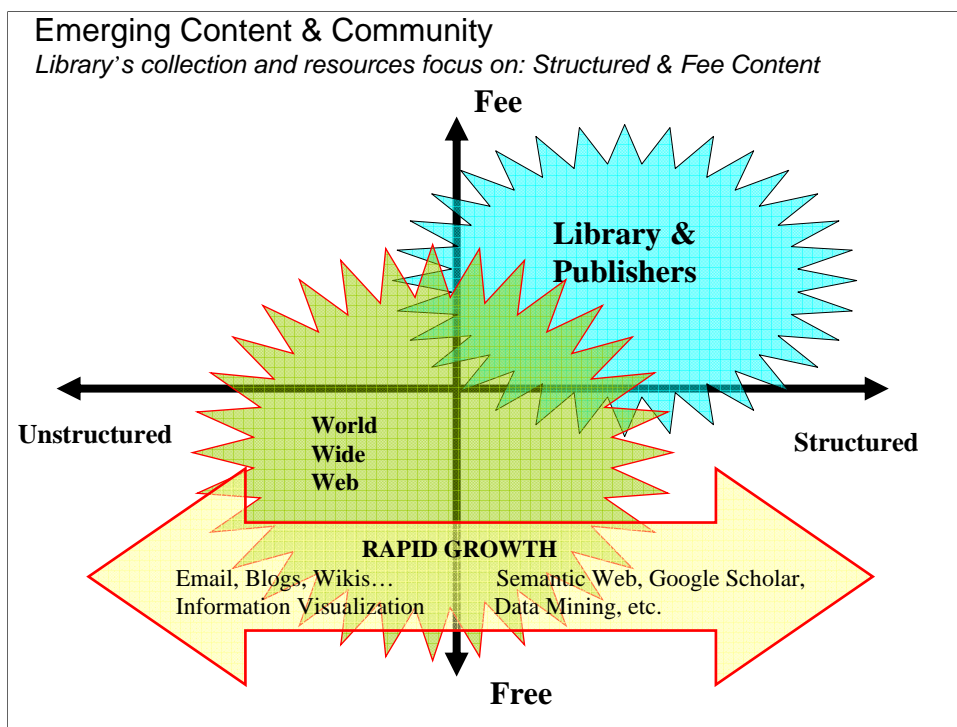
CiteSeer is a scientific literature digital library that uses autonomous citation indexing... It is one of my favorite models for a new digital library because it was developed with researcher community in mind. How many already know about this tool?

Explain Features: **Abstract, Cited by, Active Bibliography, Similar documents based on text, Related documents from co-citation, Similar documents based on a sentence level, etc.**

Summary and **You can even comment on this article or email the author.** How we support community is not only in encouraging communication, much like social tagging and mySpace have accomplished, but also providing tools the community can use to learn, research and communicate the way they want to.

CiteSeer provides algorithms, techniques and software that can be used in other digital libraries. CiteSeer indexes Postscript and PDF research articles on the Web... Full source code of CiteSeer is available.

Local artists – can we build new digital libraries that serve multiple purposes: for artist they provide portfolios and communication tools, and for digital libraries they provide a sustainable method to ingest rare but valuable community collections. Artist, Scholars, Genealogist, libraries tend to pick what priorities they have, however, how can make these distributed efforts well serve within a larger library network and service identity?



The world of content is growing, and much of it focuses on new online communities.

What should our role be with unstructured and semi-structured resources?

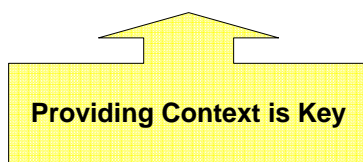
If we create a shared library framework that looks at communities differently, can we add value to user channels?

Keep an eye out on Scirus – is Elsevier transforming traditional publishing for new online communities with new structures of publishing?

Making Connections with Community

In *Content not Containers*, OCLC suggests:

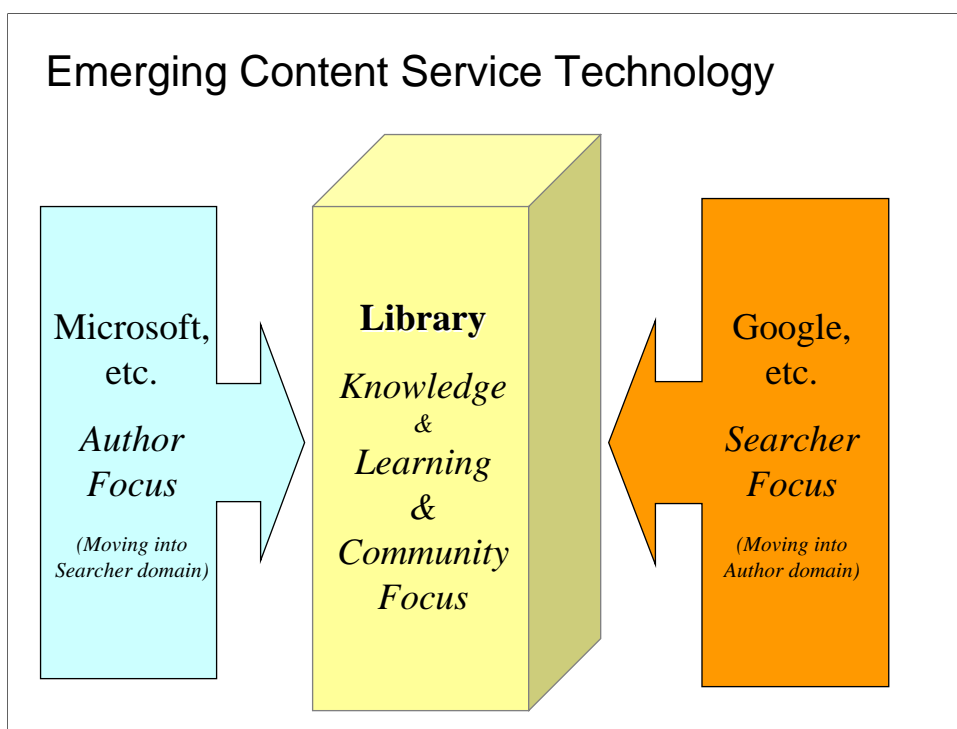
“libraries should move beyond the role of collector and organizer of content, print and digital, to one that establishes the **authenticity and provenance** of content and provides the **imprimatur of quality** in an information rich and context-poor world.”



So, we have to Establish Authenticity and Provenance (origin source) of content

And Provide Imprimatur (endorsement) of quality in an information rich and context-poor world.

That doesn't necessarily mean we should focus on the content that is licensed, or even published if our community use and creativity pours into essentially unpublished grey literature. Our role with content is linked to our users connection with content.



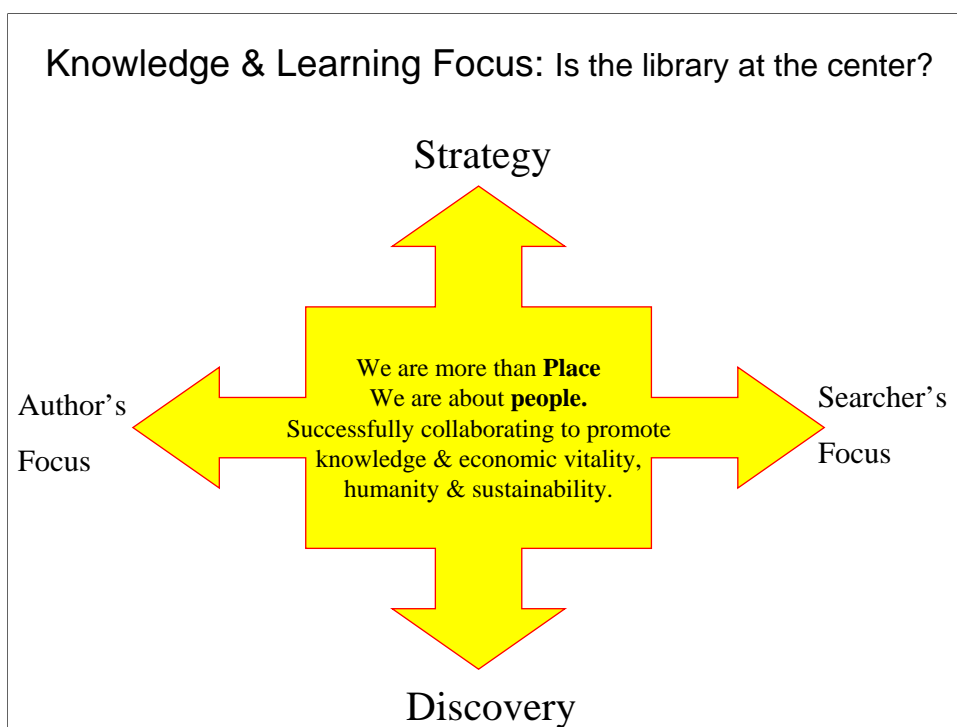
Microsoft: from operating platform to Office, to MSN, and now what may have begun as the old unsuccessful binder project, One Note an all-in-one kind of research tool is starting to show promise. **Google:** Google and other search engines centered their service around the searcher, and although Google began with a web search engine, made easier with the tool bar, it's strategy changed recently, more internalized with Google Desktop, and content acquisition oriented with Google print, and more author centered and collaborative with Gmail and Google's acquisition of Blogger. According to Charles Ferguson, in an article "What's Next for Google" in the Technology Review article, "Google & Microsoft will be fighting to control the organization, search and retrieval of all digital information on all types of digital devices."

I see it a bit differently... The two big competitors are representative and what I find most intriguing, is as they are headed into each others domains, they are headed into where we have always been.

Do we recognize ourselves as powerful allies to competing interests? Do we ask much from either? Information Literacy, Reference and Access Services, Technical Services and more are all part of a strategic service convergence for knowledge that both the author and searcher focused technology providers want because we are the best of the human component, the best of an intelligent communication exchange mechanism that largely freely provides the best possible information services to all people in a collaborative network of thousands of libraries across the globe in all languages.

Research: Google purchased Pyra Labs, creators of Blogger in 2003...

In 2003, 1.1 million registered users of Blogger software, and about 200,000 active weblogs. (Gillmore)



We are in the center of it all, albeit our center has shifted quite a bit with emerging technologies, ongoing economic pressures and competitors. Urgent change needed – yes, it isn't just affecting us, publishing has to change too.

We are, however, in a good position to affect change, because of our experience for collaborative solutions and providing context for communities of users.

However, do we know what library service can provide?

Collaborative Strategies Makeovers:
Samples of transformations making progress

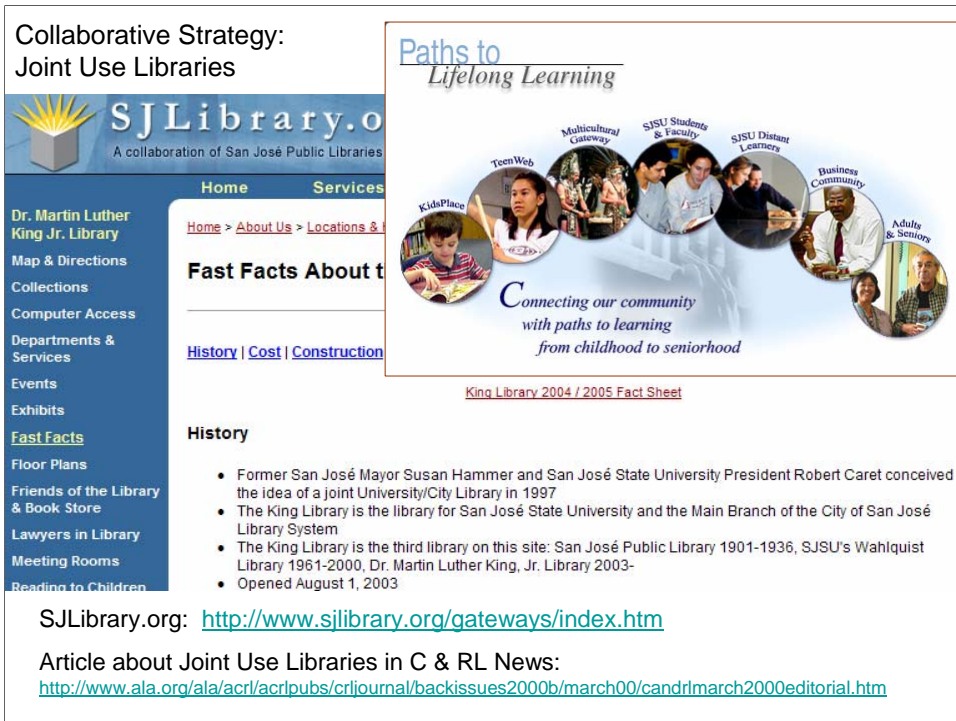
- Joint Use Libraries:
 - Public & School Libraries
 - Academic & Public Libraries
 - Special Collections as Community Museums.

- BBC : Alternative to Library

The strategy and role depends on new collaborations, at best, new collaborative strategies that promote valued library services to communities.

I will briefly illustrate using the following examples.

Collaborative Strategy:
Joint Use Libraries



Fast Facts About t

[Home](#) > [About Us](#) > [Locations & Services](#)

[History](#) | [Cost](#) | [Construction](#)

History

- Former San José Mayor Susan Hammer and San José State University President Robert Caret conceived the idea of a joint University/City Library in 1997
- The King Library is the library for San José State University and the Main Branch of the City of San José Library System
- The King Library is the third library on this site: San José Public Library 1901-1936, SJSU's Wahlquist Library 1961-2000, Dr. Martin Luther King, Jr. Library 2003-
- Opened August 1, 2003

SJLibrary.org: <http://www.sjlibrary.org/gateways/index.htm>

Article about Joint Use Libraries in C & RL News:
<http://www.ala.org/ala/acrl/acrlpubs/crljournal/backissues/2000b/march00/candrlmarch2000editorial.htm>

San Jose Public and San Jose State University created a joint use library that has made an incredible stride in adapting its identity and services to meet the needs of various communities, and by doing so have created strategic opportunities to connect with community. This could be the role of service learning between university and community, or could be simply broadening the skill set across two types of library staff.

Academic libraries, I believe, generally don't have the same connection to community as public libraries, except for community open access and more specifically, how the community uses special collections as community museum. In fact, that may be an important transformation tool for academic libraries.

In Portland, Oregon, Bob Schroeder, a Librarian at Portland State University with others began PAIL: Portland Area Information Literacy group to work collaboratively on community based information literacy programming, because they see information literacy as a community need that reaches before students enter college.

Similarly, what is our role with the aging community? Or cross or bridging generations and communities?

BBC: 1922 Radio, 1940s TV, & now so much more...

BBC White & Green Papers:
http://www.culture.gov.uk/broadcasting/bbc_charter_review/
 "A public service for all: the BBC in the digital age" White paper March 2006
 BBC Response: <http://www.bbc.co.uk/thefuture/>

BBC white paper: Department for Culture, Media and Sport, A public service for all: the BBC in the digital age, March 2006 report – like to notion of encouraging a window of creative competition. 1922 BBC broadcast only on radio, 1940 TV, currently; “8 distinct TV services, 10 national & dozens of local radio stations and operates in a world of hundreds of channels with thousands of content providers. It runs one of the most visited websites in the world;” over 230 million page impressions a month. p. 2

To achieve 2 objectives to “keep pace with technology...and to reconnect the BBC with the citizens it serves...” new Royal Charter will set out 6 new purposes for the BBC: “Sustaining citizenship and civil society; Promoting education and learning; Stimulating creativity and cultural excellence by using the license fee as venture capital for creativity; Representing the UK, its nations and regions; Bringing the UK to the world and the world to the UK; Building a digital Britain.” p. 2-3 (SOUND FAMILIAR?)

BBC is “best placed among all broadcasters to act as a “trusted guide” for the public through this process” (building digital Britain) p. 4 “The BBC will also have a role to promote media literacy.” Viewers and listeners “are starting to match the importance of other forms of literacy to work and leisure, and to the functioning of democracy.” p. 4

“Education has been central to the BBC’s mission for over eighty years. It is enshrined in Lord Reith’s famous definition of the BBC’s purpose; to inform, educate and entertain.” Green paper description: “Continue to be a major force in education and learning across a full range of subjects and issues, from traditional support for curriculum topics to areas with a wider impact on society; Contribute through formal educational material as well as informal learning through mainstream programming; Meet the different needs of different audiences, ranging from pre-school and school to adult learners and those in further education; Be at the forefront of harnessing opportunities offered by technological developments, to deliver both formal and informal learning;...” Training: “It will need to develop its training strategy...” including: “a significant contribution to its new public purpose of stimulating creativity” among its highly-skilled media workforce, and “Training in a range of portable skills” p. 43

Collaborative Strategies

“Collaboration has been touted as a critical path for libraries. But the counter forces at work—competition, institutional ranking, self-interest, ownership, user resistance—makes putting into practice problematic. However, the twin pillars of digital access and a deepening economic crisis may force libraries to embrace collaboration more fully.”

Anne Kenney, “Collections, Preservation, and the Changing Resource Base” in *Access in the Future Tense*, CLIR, April 2004

Shared cataloging never became a real success until Fred Kilgore and others at OCLC made a useful tool for cooperative cataloging.

We began by talking about an evolving ILL workflow, if we begin to automate some of the purchasing options, then why not integrate some of the acquisitions and ILL workflow, that led to cataloging, circulation, and finally a changed the nature of resource sharing. It's time for OCLC to lead again with the roll out of web services that give library services a new strategy and framework, and delivers new value to a community that has changed their expectations of libraries and information.

Can changes, such as a world library service and OCLC web services point to fundamental changes in how valued our services are in communities, and help us migrate into other relationships with our communities and among libraries?

Collaborative Strategies

Transforming our role and services is a discussion...

- What collaborative strategies make sense?
- *Comments & suggestions...*

Thank you

Cyril Oberlander, Director of Interlibrary Services, Alderman Library, University of Virginia coo4n@virginia.edu

Collaborative Strategy Resources

ACT, [Reading between the lines](#). What the ACT reveals about college readiness in reading,

http://www.act.org/path/policy/pdf/reading_report.pdf

ALA, Patron-Focused Services: Models of Collaborative Interlibrary Loan, Collection Development & Acquisitions: Presentations by: Suzanne Ward, Tanner Wray, Karl E. Debus-Lopez, Megan Allen, 2002.

<http://www.ala.org/ala/rusa/rusaourassoc/rusasections/stars/starssections/committees/illcom/ILLProgram2002.ppt>

BBC RAW: <http://www.bbc.co.uk/raw/campaign/>

Bishoff, Liz & Nancy Allen, Business Planning for Cultural Heritage Institutions, CLIR, Jan. 2004

<http://www.clir.org/pubs/abstract/pub124abst.html>

Dempsey, Lorcan, "Networkflows," Lorcan Dempsey's Weblog, January 28, 2006

<http://orweblog.oclc.org/archives/000933.html>

Evans, Philip, Bob Wolf, "Collaboration Rules," *Harvard Business Review*, July-Aug. 2005, vol. 83 (7) p. 96-104.

Holley, Robert, Kalyani Ankem, "The effect of the Internet on the out-of-print book market: Implications for libraries," *Library Collections, Acquisitions & Technical Services*, 2005, vol. 29, p. 118-139.

Levine-Clark, Michael, "An Analysis of used-book availability on the Internet," *Library Collections, Acquisitions & Technical Services*, 2004, vol. 28, p. 283-297.

Pew Internet & American Life: <http://www.pewinternet.org/>

OCLC 2003 Environmental Scan: <http://www.oclc.org/membership/escan/default.htm>

University of California Libraries, [Rethinking How We Provide Bibliographic Services for the University of California](#), Dec. 2005:

<http://libraries.universityofcalifornia.edu/sopag/BSTF/Final.pdf>

Werbach, Kevin, "Using VoIP to Compete," *Harvard Business Review*, Sept. 1, 2005. R0509J

Collaborative Strategies Task Force

Slides & Notes used during Resource Sharing Advisory Committee

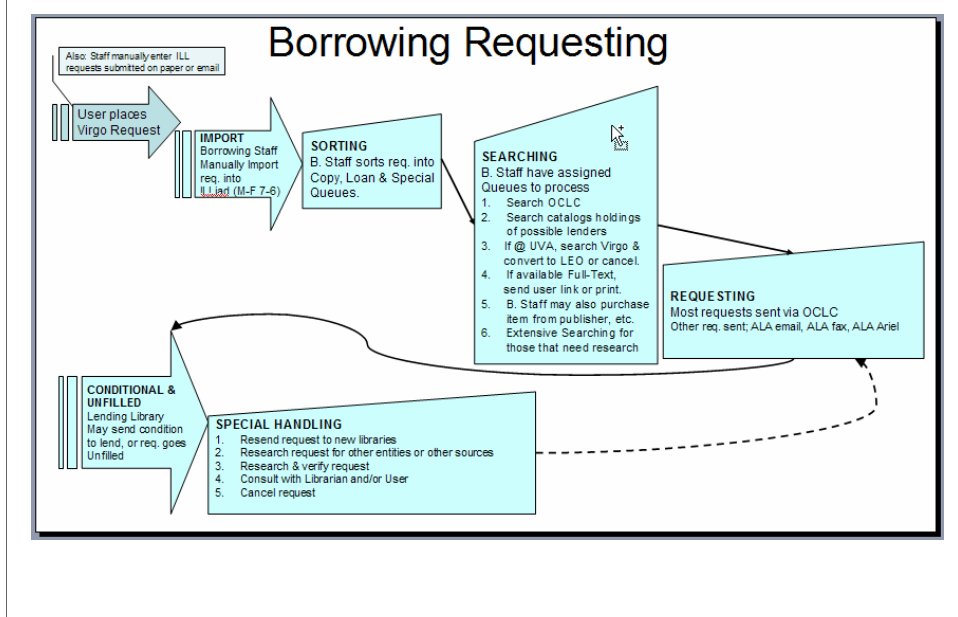
Exploring models and service relationships for Acquisition, Collection Development and Resource Sharing, our task force looked at:

- Approval Plan *levels of mediation & system interoperability.*
- Purchase Express *current activities*
- Just in Time Acquisition *scholarly articles*
- Purchase on Demand *presentations by other ILLs*
- User service, Cost, Turn-around Time, & Staff time *concerns*
- Usefulness of ILL Data *questions*
- Machine Readable Collection Building Profile *possibilities*

When does it make sense to have a request be an acquisition, selection, or borrowing request?

Exploring ideas of Just-in-Time Acquisition or ILL Purchase on Demand, we spent 6 months looking at data, considering resources and workflow, and coming up with a few proposals.

ILL Borrowing Workflow



Example of flowcharting our ILL borrowing practice.

Selection-Acquisition Workflow

Gobi Workflow

SEARCH

1. Login
2. Enter date & sub account (example ALD-SOCSCI-BOOKS)
3. Search by:
 - LC Class "CT"
 - Subject Heading
 - Publisher
 - ISBN
4. Review Brief/Full Record – checking content level: Academic, Popular, Professional, Gen-Ac, etc.
5. Checks Authors in Virgo
6. Checks TOC if on the fence.
7. Put into the cart

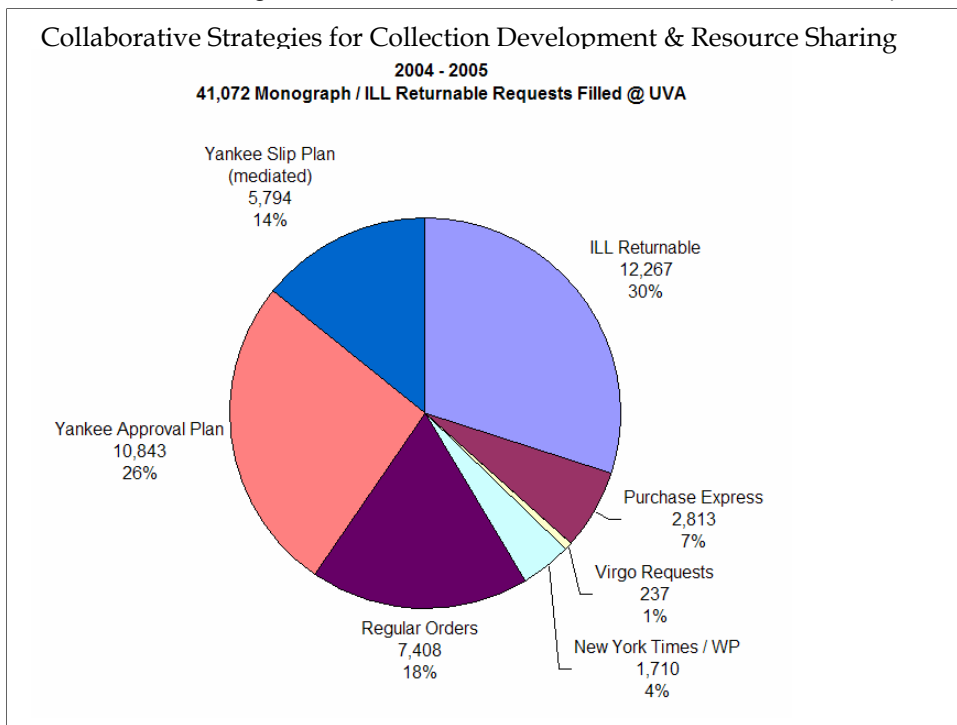
Gobi Workflow

PURCHASE

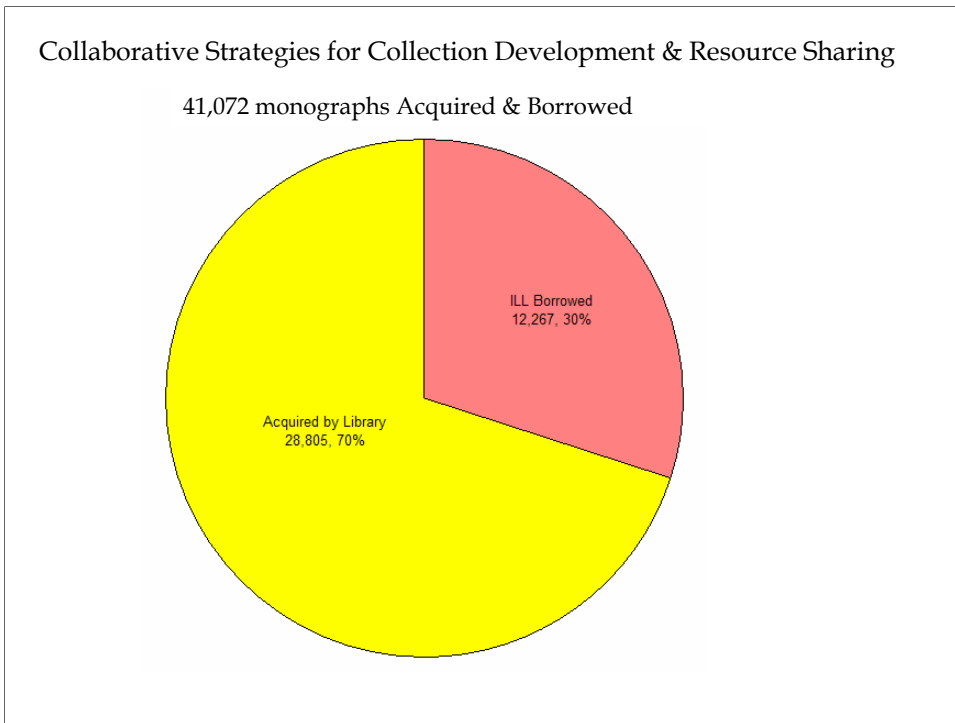
1. Select Order Cart
2. Apply Template
3. Assign fund to selected orders.
4. Template fills in details.
5. Add Patron Name & ID on Staff Note item notification.
6. Gobi downloads record into Virgo next day.

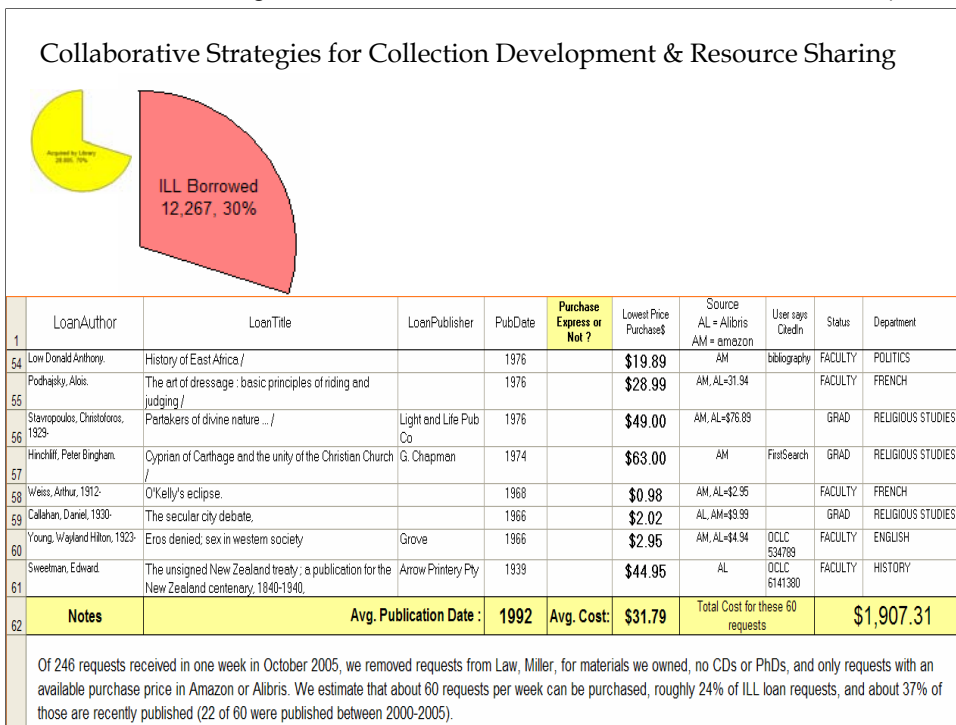
UNIVERSITY OF VIRGINIA LIBRARY Reserves for Sciences		LC CLASS ASSIGNMENTS Albeman and Science-Engineering Selectors
A GENERAL WORKS		
AC-AZ	Karen Marshall	
B PHILOSOPHY, PSYCHOLOGY, RELIGION		
B-SD	Gary Treadway	
BF	Heidi Dodson and Gary Treadway (historical aspects, parapsychology, and the occult)	
BH	Gary Treadway	
BJ	Gary Treadway, and Heidi Dodson for Ethics	
BL	George Crafts and Philip McEldowney	
BM	George Crafts	
BP-BQ	Philip McEldowney	
BR-BX	George Crafts	
C AUXILIARY SCIENCES OF HISTORY		
C-CB	George Crafts	
CB	Heidi Dodson (History of Technology)	

Looking at Approval plans and acquisition workflows



Looking at one year's worth of data.





Using data from one busy week, we outline some projections.

Collaborative Strategies for Collection Development & Resource Sharing

ASSESSING ILL/DD SERVICES STUDY RESULTS FOR ARL LIBRARY PARTICIPANTS, MEAN VALUES				
	Borrowing		Lending	
	2002	1996	2002	1996
Unit cost, Mediated	\$17.50	\$18.35	\$9.28	\$9.48
Unit cost, User-initiated	\$2.04-\$14.70	NA	\$3.47-\$12.06	NA
Fill rate, Mediated	86%	85%	58%	58%
Fill rate, User-initiated	84-91%	NA	76%-88%	NA
Turnaround time, Mediated	9.29 days (loans) & 6.23 days (copies)	16.9 days (loans) & 14.9 days (copies)	1.75 days (loans) & 1.37 days (copies)	NA
Turnaround time, User-initiated (loans)	2.30-8.23 days	NA	0.57-1.45 days	NA

According to Mary Jackson's study of ARL libraries, the average cost to a borrowing library (not including the cost to a lending library) was \$17.50.

<http://www.arl.org/newsltr/230/illdd.html>

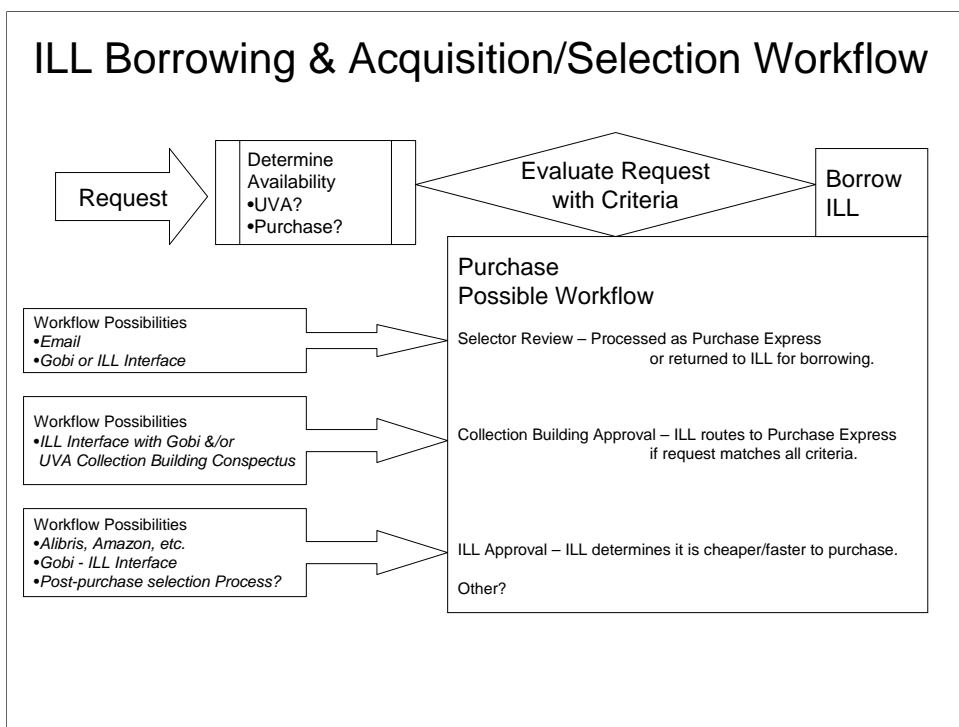
Buy or Borrow?

2005 returnable ILL requests with sample data analysis			
ILL returnable requests in 2005	% Available to Purchase	Total available to purchase	Total Est. Cost
12,267	24.39%	2,992	\$95,109.64
<i>Recent pub-date subset, for example 6 years 2000-2005</i>			
	8.94%	1,097	\$34,873.54

If we take our one week data....

We found that in our 246 requests in one week, only 24% were available to purchase new or used.

One academic library study found 95% availability from the Internet out-of-print book market. (Holley, Ankem, 2005)



First draft of possibilities of an ILL and Acquisitions workflow.

Findings / Proposals

A. Maintain traditional workflow:

- Requests that start as ILL remain borrow, requests that start as Purchase Requests remain selector decision.
- Possibly adding a decision by the users to decide - recommending purchasing or recommending borrowing.

B. Pilot and assess ILL Purchase on Demand for:

- If the book is available for less than \$8, ILL purchases the item, when the item is returned, we send it to selector to evaluate acquiring.

C. ILL converts ILL request to orders for available materials:

- For materials > \$8 and < \$50 with parameters...

	Cost per week	<i>Est. cost per year</i>
ILL	\$79.49	\$4,133.48
Collections >\$8	\$1,808.30	\$94,031.60
Collections >\$8 & <\$50	\$663.38	\$34,495.76
Collections >\$8 & <\$50 & published within 5 yrs.	\$245.81	\$12,782.12

What are the estimated cost projections for buying within criteria?

Conclusion: How likely is it?

- If the ILL system made it very convenient to evaluate buy vs. borrow, would your library use it? Why / Why not.
- What challenges are there to implementing this workflow at your library?
- Would you use a subscription service through WRS & ILLiad to rent DVDs, Videos, Music?
- Comments / Suggestions