Collaboration on print decisions to release capacity for diverse forms of study

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Executive Committee Member, OCLC Asia Pacific Regional Council (APRC)

OCLC Asia Pacific Regional Council Meeting 2016
Hong Kong

- Population: 7.35 M
- Area: 1,104 km²
Hong Kong Higher Education

• 8 publicly funded higher education institutions
• 95,521 University Grants Committee (UGC) funded full-time equivalent students in 2015/16
• Four year curriculum commenced in September 2012 → Drastic increase in number of students
<table>
<thead>
<tr>
<th>University</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Chinese University of Hong Kong</td>
<td>19,084</td>
</tr>
<tr>
<td>The University of Hong Kong</td>
<td>18,655</td>
</tr>
<tr>
<td>The Hong Kong Polytechnic University (PolyU)</td>
<td>17,345</td>
</tr>
<tr>
<td>City University of Hong Kong</td>
<td>14,198</td>
</tr>
<tr>
<td>Hong Kong University of Science and Technology</td>
<td>10,391</td>
</tr>
<tr>
<td>The Education University of Hong Kong</td>
<td>7,019</td>
</tr>
<tr>
<td>Hong Kong Baptist University</td>
<td>6,221</td>
</tr>
<tr>
<td>Lingnan University</td>
<td>2,608</td>
</tr>
</tbody>
</table>
E-preferred Acquisition Policy of the PolyU Library

Library Holdings

- BOOKS
  - Print: 24%
  - Electronic: 76%

- JOURNALS
  - Electronic: 98%
  - Print: 2%

Budget

- Print: 14%
- Electronic: 86%
Zoning Library Space by Various Modes in Experiencing Information

<table>
<thead>
<tr>
<th>Quiet floors</th>
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<tbody>
<tr>
<td>Collaboration floor</td>
</tr>
<tr>
<td>(30% of Library study seats are for collaborative study)</td>
</tr>
<tr>
<td>Maker space floor</td>
</tr>
<tr>
<td>(a studio, a video wall with 9 LEDs for different devices, a Mac lab, 4 poster printers, a 3D printer, video conferencing equipment)</td>
</tr>
<tr>
<td>Service points &amp; exhibition floor</td>
</tr>
</tbody>
</table>
Watch Video on
New Collaborative Zones, Maker Spaces and Quiet Study Areas in Pao Yue Kong Library

at https://youtu.be/88GFdw3UPVw
• E-preferred acquisition policy
• Zoning Library space by various modes in experiencing information
• 11% of total print volumes on compact shelves
• 21% of total print volumes kept in the Library Remote Store in an industrial building in Hong Kong
• Long term loan of print journals with perpetual online access to a non-JULAC library which provides free article scanning service if needed
• JULAC collaboration on print resources
JULAC Collaborations For Print Resources

1. Joint Universities Research Archive (JURA)
2. Joint Distributed Print Journal Working Group
3. Hong Kong Academic Library Link (HKALL)
4. JULAC Library Card
5. Shared Integrated Library System
Joint University Librarians Advisory Committee (JULAC)

• Established in 1967 by the Heads of Universities Committee (HUCOM)
• A forum to discuss, coordinate, and collaborate on library information resources and services
• Comprises of the 8 university libraries funded by the UGC
• 11 sub-committees
1. Joint Universities Research Archive (JURA)

- 3 storey (initially)
- 1 JURA storey = 3 regular floors
- Automated Storage and Retrieval System (ASRS)
JURA Capacity

Initially: 5.3M
After expansion: 8.4M
Governance

Jointly owned by 8 JULAC libraries

JURA is a charitable organization

JURA Board of Directors are the 8 JULAC Librarians
Delay in building JURA

Pending for funding approval from the Hong Kong SAR Government

**BUT!**

JULAC libraries reaching crisis mode, almost 97% full storage capacity
Virtual JURA: Joint Distributed Print Journal Working Group

• Delay in JURA → “Virtual JURA”

• To identify one copy that should be retained for storage among JULAC Libraries (and for JURA in future) and other copies that can be discarded

• Joint Distributed Print Journal Working Group formed in 2014
Joint Distributed Print Journal Working Group

To retain **unique** and **last copy** print academic journals with the most complete runs possible, and **distribute** the journal assignment in an **equitable manner**.
Memorandum of Understanding

JULAC libraries signed a Memorandum of Understanding which outlines the responsibilities of JULAC libraries who agree to hold runs of printed journal for archiving, so that copies of such materials can be retained and preserved for the benefit and use of students and faculty in perpetuity.
Joint Distributed Print Journals Working Group

• The Group examined a few best practices from consortia dealing with distributed print management
• Established guidelines for inventory serial holdings
• Set criteria for assembling print runs
• Tested methodology with JSTOR as a common set of titles to start with
JSTOR Collections (2014), STEM Collection (2015)

- Coordinated by the HKU Libraries
- JSTOR:
  - All JULAC libraries have access to JSTOR
  - Responsibilities for holding titles and volumes were assigned to all JULAC libraries
  - 53% of the total volumes were kept and distributed among the 8 libraries
  - 47% of the total volumes were identified for weeding
- STEM:
  - Challenges - title listing is at least 4 times longer compared to those in the JSTOR collection
  - 45% of total volumes were kept and distributed among the 8 libraries
  - 55% of total volumes were identified for weeding
### Business Collections: On-going
Coordinated by the PolyU Library

<table>
<thead>
<tr>
<th>Stage 1</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>End of May 2016</td>
<td>Titles submission</td>
</tr>
<tr>
<td>End of August 2016</td>
<td>Consolidated titles submitted</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 2</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>End of October 2016</td>
<td>Submitted titles with holdings</td>
</tr>
<tr>
<td>January 2017</td>
<td>Completion of responsibility allocation</td>
</tr>
<tr>
<td>February 2017</td>
<td>Statistics submission to JULAC</td>
</tr>
<tr>
<td>March 2017</td>
<td>Report submission to JULAC</td>
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**What’s next?**

**Social Sciences Collections in 2017**
To be coordinated by the CUHK Libraries
3. Hong Kong Academic Library Link (HKALL)

• User initiated monograph requests across all 8 JULAC libraries
• **INN-Reach** software (till June 2017) enables users from one library to:
  • Make direct requests on monographs of other JULAC libraries
  • Borrow materials belonging to another library
  • Have materials delivered to users’ respective institutions by a common courier for checkout.
• **HKALL** connects the library automation systems of all 8 JULAC libraries:
  • Automatic harvest of bibliographic records from all 8 libraries to create a central database for searching and requesting materials.
  • Immediate and automatic updates to the central database from the 8 local catalogues.
Hong Kong Academic Library Link (HKALL)

- Quicker turnaround time than usual interlibrary loan as requests are patron-initiated with almost no staff time involved.
- Union catalogue stores holding information but no patron records are duplicated on the central server. Patron verification is handled by communications between central HKALL system and the patron's local library system.
JULAC Library Card

• A common card for physical access to other JULAC Libraries in Hong Kong
• For current staff and students of the 8 universities only
A shared integrated library system for all 8 JULAC libraries effective July 2017

- Cloud-based single ILS used by all 8 JULAC libraries, while each library can have its own settings and data
- Integration with discovery tool for accessing discovered objects including external contents such as cover arts, TOC, summary
- Collaborative collection development and cataloging
- More efficient user initiated borrowing between 8 libraries

Seamless user initiated interlibrary loans
Integration with discovery tool
Sharing or co-development of APIs
Single Cloud-based ILS
Collaborative Collection Development and Cataloguing
Joint consortia purchasing
Allow individual settings, separation and sharing of certain data
Shared ILS Development Timeline

2013
- JUN: JULAC 2013-16 Strategic Planning Day

2014
- FEB: ILS Consultant Visit
- SEP: Shared ILS Working Group Formed, Worked with Sub-committees

2015
- APR: 5 Functional Sub-groups Formed
- JUL: Request For Proposal Finalized
- AUG: Tender Closed
- SEP: Pre-demo Interviews and Score Sheets Confirmed
- NOV: Demo Scripts Ready and Product Demos

2016
- APR: Announcement of Awarded Product
- JUL: GO LIVE

2017
- AUG: Development started
Thank you