

Are you asking the ultimate question?

The answer could determine your library's future

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One simple question largely determines an organization's future: **Would you recommend us to a friend?** The answer measures the customer experience and your reputation in the marketplace. It also indicates whether your library will grow or shrink. Read about this one-question survey and the latest efforts in library customer service and assessment.

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A word from Jay Jordan

Looking forward to 2007

2006 HAS BEEN AN EXTRAORDINARY YEAR FOR THE

OCLC cooperative, and 2007 looks equally promising.

This past year, we continued to enhance our core services in cataloging, resource sharing and reference with new tools and functionality. We launched new services and entered into important strategic alliances. Moreover, WorldCat grew faster than ever.

In 2006, we launched:

- the WorldCat.org Web site, making collections in OCLC members libraries visible on the Internet to people everywhere;
- the eSerials Holdings and Terminologies services, which help libraries manage their electronic and print colletions;
- the WorldCat Selection service, which streamlines the selection/acquisitions process;
- a new eContent platform for NetLibrary that provides an improved end-user experience; and
- large shared eBook collections through purchases by consortia in China, Hong Kong, Taiwan and Thailand.

We combined operations with RLG and established the RLG Programs division within OCLC Programs and Research. We acquired DiMeMa, the organization that developed and supports CONTENTdm software, which is distributed by OCLC and used by more than 300 institutions to manage their digital collections. We integrated the staff of Sisis Informationssysteme Gmb into OCLC PICA Germany and the staff of Fretwell-Downing Informatics into OCLC PICA UK. We acquired the assets of Openly Informatics, whose linking software and database of e-resources metadata accelerated the launch of the eSerials Holdings service.

OCLC Research released prototypes for the DeweyBrowser and audience assessment. The PREMIS Data Dictionary for Preservation Metadata, developed by a working group convened by OCLC and RLG, won awards from the British Library and the Society of American Archivists.

We received two additional grants from the Bill & Melinda Gates Foundation in October: \$2 million to enhance the usability of the WebJunction site; and \$1.2 million for the marketing team to research the potential of creating a national advocacy program to support public libraries. The Gates Foundation is an important partner for public libraries and OCLC as we seek to provide improved services to users.

In 2006, WorldCat grew at a truly extraordinary rate—about 15 million records and 100 million location listings—for four reasons. First, we have significantly improved our batchloading capabilities with our new technological platform, going from processing some 500,000 records a day to about 2 million.

Second, an increasing number of international organizations

have committed to load their national union catalogs or other large files into WorldCat. In 2006, WorldCat was enriched with records from the Dutch Central Catalogue, the National Union Catalog of Poland, the Latin American and Caribbean Literature on Health Science Database (LILACS), and the German National Bibliography from the Deutsche Nationalbibliothek.

Third, the subscription pricing model implemented this year has eliminated transaction charges, thereby promoting increased use of online cataloging.

And fourth, our new technological platform supports group catalogs, FRBR, Unicode and Web exposure of library resources, all of which encourage contribution to WorldCat.

Clearly, we have added value to the OCLC cooperative in the past year. Looking ahead, we have an ambitious agenda for 2007, including:

integrating the 45 million-record RLG Union Catalog into

WorldCat and synchronizing ArchiveGrid and CAMIO with WorldCat;

- implementing a WorldCat Registry—a directory of libraries, their locations (including branches) and the services they provide;
- launching a group resolution service;
- testing a home delivery service; and
- enhancing WorldCat.org with new features and capabilities, including a pilot citation management service.

2006 was also a year for reflection, due to the passing of our founder, Fred Kilgour. With the Kilgour family in attendance, we celebrated his life and achievements on October 31, and we will do so again at the ALA Midwinter Meeting in Seattle on January 20. Clearly, as can be seen from our accomplishments this year and our plans for

2007, Fred's vision thrives.

As we begin 2007, I would like to thank OCLC's 1,200 employees in 26 locations around the world for their hard work this past year. I would also like to thank the thousands of information professionals in participating institutions around the world for their continued strong support of the OCLC cooperative. At a time when a few commercial enterprises are dominating the information landscape, it is more important than ever that we in the OCLC cooperative continue to pursue our public purposes.

Joy Inda-

Jay Jordan

OCLC President and Chief Executive Officer

July 706

What's up with RLG services?

WHEN THE MEMBERSHIP OF THE RESEARCH LIBRARIES GROUP

(RLG) overwhelmingly approved the agreement to combine with OCLC, the task of integrating services became a top priority. Here is a progress report.

Technical services. OCLC Connexion now features RLIN21 online cataloging functionality for searching authority history and for guided entry for archival control fields, as well as additional non-roman support and authority searching for the Z39.50 service. OCLC staff began loading RLG catalog records into WorldCat in December 2006. Support for institutional records (record clustering) is coming in May 2007. By July 2007, the RLG Union Catalog will be completely merged with WorldCat and all RLG libraries will be using Connexion.

Discovery services. In June 2007, 12 of the 17 RLG Eureka databases will be migrated to OCLC FirstSearch. Those to be discontinued: English Short Title Catalogue, Handbook of Latin American Studies, Index to Foreign Legal Periodicals, Inside Information Plus and Index to Hispanic Legislation. The Hand Press Book Database and SCIPIO: Art and Rare Book Sales Catalogs will be integrated into WorldCat and searchable via FirstSearch as well as Connexion for updating by catalogers.

Resource Sharing. Data fields from RLG's ILL Manager for e-delivery addresses are now included in OCLC ILLiad and WorldCat Resource Sharing workforms. The fields will be added to Constant Data and IDR profiles in January 2007. Users of ILL Manager will migrate to an OCLC resource sharing service by September 2007. To help users migrate, OCLC will archive requests from ILL Manager into a central database in June 2007 from which users can search, display and export. The RLG SHARES Program is continuing and efforts are underway to expand the number of participants. In addition, a new statistical report will be available for SHARES users that provides an overview of resource sharing transactions between libraries.

Service moves. RLG's ArchiveGrid is now hosted in the OCLC Data Center. The migration included porting ArchiveGrid from the Sun Solaris operating system to Linux, adding usage statistics and implementing OCLC's authentication system. The CAMIO service will move to the OCLC CONTENTdm platform. Citation formatting features based on RLG's RedLightGreen, which ended in November 2006, will be added to WorldCat.org in 2007. No decision has been made regarding RLG Cultural Materials.

For more information, view www.oclc.org/community/rlg.





ILL analyses = data-driven collection development

WORLDCAT COLLECTION ANALYSIS CAN NOW EVALUATE A

library's ILL activity to create borrowing and lending analyses and identify potential collection development opportunities. This enhancement crunches WorldCat Resource Sharing data, as well as ILLiad transactions that go through WorldCat Resource Sharing, to give a library the ability to:

- compare borrowing requests over time to identify acquisition priorities;
- compare borrowing requests based on age, subject, serial and nonserial items;
- analyze what your library borrows—items that supplement your collection; and
- analyze items your library is lending—which reveals how your collection is used.

For more information, visit www.oclc.org/collectionanalysis/.

WorldCat Cataloging Partners emerges

THE OCLC CATALOGING PARTNERS PROGRAM IS

merging with the OCLC PromptCat service to form WorldCat Cataloging Partners. The new, enhanced service is a collaborative effort with materials vendors to reduce the cost of cataloging for libraries.

WorldCat Cataloging Partners delivers OCLC
MARC records for materials ordered through participating
vendor partners, as well as setting a library's holdings
automatically in WorldCat. It has three levels of service. The
Basic Service provides automated copy cataloging, while the
100% Record Delivery option guarantees a record for every title. The
Customized Record Delivery option offers customized local editing that
can't be done through automated processes.

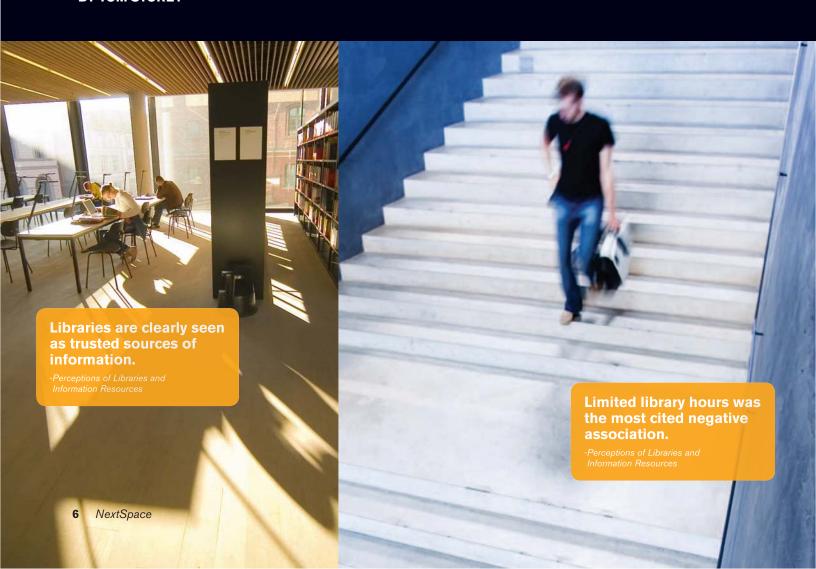
For more information, visit www.oclc.org/catalogingpartners/wccp.htm.



Are you asking the ultimate question?

The answer could determine your library's future

As libraries battle popular search engines and Internet research services for users, the new book *The Ultimate Question* by Fred Reichheld says that one simple question determines an organization's future: **Would you recommend us to a friend?** Learn more about this one-question survey and the latest efforts in library customer service and assessment.





fter more than 25 years of studying customer loyalty, consultant Fred Reichheld discovered that one simple question largely determines an organi-

zation's future: Would you recommend us to a friend?

Forget about expensive market research. Forget about fancy tools that crunch data. Forget about the customer satisfaction survey. All of them are complicated, biased and confuse customer transactions with customer relationships.

Only one question matters. Reichheld calls it *The Ultimate Question*, and the metric it produces is the Net Promoter® Score (NPS).

In January 2006, Reichheld published the book *The Ultimate Question*, which recently ranked #1 on the *Wall Street Journal* and *USA Today* business best-sellers lists. The book drove interest in Net Promoter Scores, so Reichheld teamed with Satmetrix Systems, a leading customer experience management (CEM) software company, to launch the netpromoter.com Web site and blog. The inaugural Net Promoter Conference will be held January 31 and February 1, 2007.

Reichheld is rolling out *The Ultimate Question* to organizations searching for a simple process that measures the customer experience and links it directly to revenue growth. He has a number of big-time clients—General Electric, Bearing-

Point, American Express, Microsoft, Intuit—who rely solely on NPS to gauge their reputations in the marketplace. GE has even tied executive bonuses to NPS.

Furthermore, although developed for the business world, *The Ultimate Question* and NPS can be used by anyone interested in measuring the state of customer satisfaction and proactively fixing problems, says Reichheld.

"Schools, hospitals, charities, government agencies—organizations of any kind—can put these ideas into practical use," he says. "Nonbusiness organizations also have customers; they need to delight the people they serve, and they too can benefit greatly from the use of one simple metric."

How does The Ultimate Question work?

Using the phone, the mail or the Internet, organizations send out a one-question survey that asks: On a scale of 0-10, how likely is it that you would recommend us to a friend or colleague? Promoters score a nine or 10 and are loyal enthusiasts who keep buying from a company and urge their friends to do the same. Passives receive seven or eights and are satisfied but unenthusiastic customers who can be easily wooed by the competition. Detractors are the rest: unhappy customers who feel ignored or mistreated and plot to get even. The Net



More about Fred Reichheld

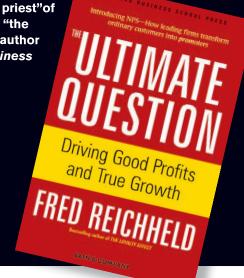
Fred Reichheld is a Bain Fellow and Founder of Bain's Loyalty practice that helps clients achieve superior results through improvements in customer, employee, partner and investor loyalty. His pioneering work has quantified the linkage between loyalty, profits and growth.

In the June 2003 edition of *Consulting Magazine*, Reichheld was recognized as one of the world's top 25 consultants.

According to *The New York Times*, "[He] put loyalty economics on the map." *The Economist* refers to him as the "high priest" of loyalty. And *1to1 Magazine* calls him, "the undisputed king of loyalty." He is the author of two books and seven *Harvard Business Review* articles on the subject.

Source: www.bain.com

"Nonbusiness organizations also have customers; they need to delight the people they serve, and they too can benefit greatly from the use of one simple metric." -Fred Reichheld



Promoter Score is calculated by subtracting the percentage of detractors from promoters.

Often, companies add a follow-up question—If you would not recommend us, why not?—to identify the most pressing issues with detractors.

For General Electric, *The Ultimate Question* survey revealed poor scores and stinging feedback for its Capital Solutions group, which provides business loans and leases. In response, GE streamlined its loan process and won back detractors. Complaints were increasing and market share was slipping when Intuit's TurboTax used *The Ultimate Question*. They found that tech support was the major problem, so the company boosted staffing levels and returned all phone tech-support functions to the United States and Canada. IPower, a Web hosting company, discovered that about 40 percent of its clients were detractors who wouldn't recommend them. They opened a new service center with 185 employees to answer customer calls quickly and their NPS score is on the rise.

How do companies stack up?

Those with the most efficient growth engines—companies such as Amazon.com, eBay, Costco, Vanguard and Dell–operate at NPS efficiency ratings of 50–80 percent. In recent research done by Reichheld and Satmetrix, Apple, Google and Symantec—companies well-known for their market performance and brand leadership—had the highest NPS scores in the high-tech industry.

But the average firm sputters along with an NPS rating of 5–10 percent. In other words, promoters barely outnumber detractors. Many firms—and some entire industries—have negative Net Promoter Scores, says Reichheld, which means that they are creating more detractors than promoters day in and day out. These abysmal scores explain why so many companies cannot deliver sustainable growth, no matter how aggressively they spend on acquisitions, advertising, promotion, research and development or customer satisfaction.

Can a one-question survey work?

Reichheld did his homework. Over a 10-year period working with Bain & Company, Reichheld gathered financial and market data from numerous companies and industries to put his theory to the test. He found that in most industries, companies with the highest Net Promoter Scores grow at more than twice the rate of the competition. Companies that achieve long-term profitable growth have Net Promoter Scores two times higher than the average company. These companies also spend much less on marketing and new-customer acquisition than their counterparts.

Reichheld also tested the classic customer service questions: how satisfied are you, does this organization set a standard of excellence, does this organization deserve my loyalty. His results? The question with the highest "R2"—the highest relationship to growth—was "Would you recommend us to a friend?" There was no correlation between growth and the

fleeting attitudes expressed in traditional satisfaction surveys.

In addition, it appears that *The Ultimate Question* and NPS scores uncover the true feelings of customers. Firms that had NPS ratings of 5–10 percent were receiving satisfaction scores of 80–90 percent in their market research, Reichheld says. Follow-up research verified that 80 percent of customers who left for a competitor were "satisfied."

"In short, companies that measure success primarily through the lens of financial accounting tend to conclude that loyalty is dead, relationships are irrelevant, and the treatment of customers should be governed by what seems profitable rather than by what seems right," says Reichheld. "Managers focus on profits regardless of whether those profits represent the rewards from building relationships or the spoils from abusing them

"Ironically, customer loyalty provides companies with a powerful advantage—a battalion of credible sales and marketing and PR troops who require no salary or commissions. Yet the importance of these customer promoters is overlooked."

The state of library customer service

Ever since the Royal Library of Alexandria was founded in the Third Century B.C., libraries have been in the business of providing information and serving people. Today, however, they are under mounting pressure to show their effectiveness and quantify their value in order to justify funding or requests for increased funding.

Up against popular search engines and Internet research services, libraries are battling to prove their worth and grow a vibrant community of loyal promoters and dedicated users during a period of rapid and unpredictable change in libraries and the information environment, as well as a fundamental shift in how scholarly information is found and used.

Based on results from OCLC's groundbreaking report, Perceptions of Libraries and Information Resources, libraries have work to do regarding customer service. The customer service category yielded the highest number of negative associations in this benchmark study of 3,348 library users in the United States, Canada, United Kingdom, Australia, Singapore and India.

When asked to provide in their own words two positive and two negative associations about libraries, 2,985 respondents provided 4,793 negative comments; negative customer service associations outnumbered positive associations 1,106 to 238.

Limited library hours was the most cited negative association; fees, inflexible return policies and other policy issues also were cited. Other frequently cited negative associations related to facilities and environment and included noise levels, crowds, parking and library location.

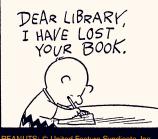
The study also indicated that the majority of library users now start—and often conclude—their information searches via Internet search engines. The data indicated that users are satisfied with these new, Internet-based information services, believing them to be fast and accurate, and that they provide quality information and fit their lifestyles. While libraries are clearly still seen as trusted sources of information, many respondents also indicated that search engines have also become trusted sources of information.

As these results suggest, the world has changed, says Steve Hiller, Director of Assessment and Planning, University of Washington Libraries. Libraries are in a very competitive environment in the digital age.

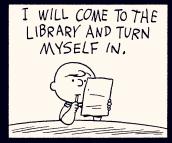
"We are no longer the only information game in town, if we ever were," he says. "Our communities have access to a vast array of information that we couldn't even dream of ten years ago. The structured and controlled access to the world of information that libraries established during much of the 20th century has literally been blown away."

Hiller says that massive general search engines, such as Google and Yahoo, are providing not only links to Web information but increasingly to physical and electronic content—books,

Advice from a user



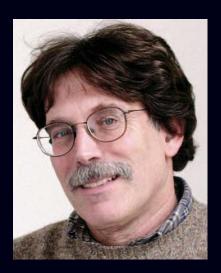






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In OCLC's Perceptions of Libraries and Information Resources survey, respondents suggested that libraries reexamine the rules and fines/fees associated with using library materials.



More about Steve Hiller

Steve Hiller has been active in library assessment for 15 years and has presented and published widely on a number of assessment-related topics during that period. At the University of Washington Libraries, he is Director of Assessment and Planning. Previously he was Head of the UW science libraries for more than 20 years and also served as Library Assessment Coordinator during part of that time. Hiller also serves as a Visiting Program Officer for the Association of Research Libraries working on library assessment and is co-leading a new ARL service, "Effective, Sustainable, and Practical Library Assessment," which is open to any library. Hiller also serves as an evaluator for the Northwest Commission on Colleges and Universities, a regional higher education accreditation agency, and has been on five institutional accreditation teams.

"We still have a long way to go but since 2000 libraries have made great strides in becoming more customer focused." -Steve Hiller

journals, audio/visual materials and reference sources, which used to be the sole province of libraries. In addition, accountability has shifted from "are we spending our money efficiently and wisely" to "what difference does the library make?"

What is library assessment?

Hiller defines library assessment as a structured process to learn about communities and evaluate how well the library supports them. The information acquired through library assessment is used in an iterative manner to improve library programs and services and make libraries responsive to the needs of their communities. At the University of Washington Libraries, Hiller helped build a culture of assessment that aims to set new standards of excellence in service and customer relationships. Every three years, the library conducts a detailed survey to find out how students and faculty use libraries, what is important to their work, their satisfaction with libraries and their future needs. In 2007, it will conduct its sixth survey. Assessment information has been used to renovate and refocus UW libraries to better support undergraduates, make an early switch from print journals to online only, enhance resource discovery tools and Web site usability, implement standardized customer service training for all library staff, and stop doing activities that do not add value to customers.

Hiller also has been part of an Association of Research Libraries (ARL) effort to make assessment effective and sustainable. He and colleagues Jim Self at the University of Virginia and Martha Kyrillidou at ARL lead this effort, "Making Library Assessment Work: Practical Approaches to Developing and Sustaining Effective Assessment," which focuses on evaluating assessment efforts and recommending ways of moving assessment forward. Twenty-four libraries have participated in the project, which involves a 1.5-day site visit and follow-up report with specific recommendations for each library.

Preliminary findings from their visits:

- Libraries are keenly interested in building a culture of assessment, collecting and using data for management, and demonstrating the library's positive impact on teaching, learning and research.
- Libraries continue to keep lots of statistics, but rarely use them for management and service improvement.
- Library organizational structures and decision-making processes often are not set up in ways to facilitate change.
- External factors, such as accreditation, organizational review and budgets, are important motivators for assessment

"Right now, few libraries have the skills to implement an effective program," Hiller says. "Most aren't asking the right questions and are unsure about what to do with the data they have or how to collect information they need."

Library assessment: job #1

Still, it appears that assessment is gaining momentum and libraries are gearing up for the customer service challenge.



Library assessment

Library assessment is a structured process to learn about communities and evaluate how well the library supports them. The information acquired through library assessment is used in an iterative manner to improve library programs and services and make libraries responsive to the needs of the communities.



Some evidence:

- More than 1,000 libraries worldwide have used LibQUAL+™, a service-quality evaluation survey developed by ARL that is relatively inexpensive and easy for libraries to implement, Hiller says. Participating libraries have gathered more than 750,000 survey respondents, an excellent first step into assessment and service quality measurement.
- Registration at the first North American conference ever on library assessment in September closed weeks before the event due to the overwhelming response from libraries. The conference proved so successful that a second one has been scheduled for Seattle in August 2008. Additional information about these conferences can be found at: www.arl.org/stats/ laconf/index.html.
- Libraries are increasingly dedicating staff to customer service and assessment. More than half of the libraries Hiller and Self visited as part of their consulting now have an individual identified while most others have a group focused on assessment and service quality.
- Integrated library systems have developed modules that can provide detailed information on collection usage so that libraries can keep much better track of what's being used.
- Publishers and third parties are providing much better information on the use of virtual resources using standardized and consistent methods.

Hiller says the greatest impact of the emerging library assessment field has been on library space-both virtual and physical. Several libraries that participated in the ARL project used negative survey responses to library space to bolster their cases for getting new or extensively renovated space.

"Usability is a great success story as it incorporates direct user input into Web design and content. On the physical side, much of the major renovation work or new construction in libraries has incorporated the customer focus. Such methods as observation, surveys, focus groups, interviews, wayfinding and furniture 'usability' are becoming standard tools for ensuring that our facilities are attractive but also address the needs of our customers."

Clearly, Hiller says, libraries are well on their way to establishing a learning community for library assessment and dynamic customer service function. And the timing couldn't be better.

"We still have a long way to go, but since 2000, I believe libraries made great strides in becoming more customer-focused. Certainly competition and accountability play major roles. However, awareness of the value of good customer service and better tools to help assess use, user satisfaction and needs have played an equally important part."

"Assessment is an integral tool to understand our customers' needs and preferences," Hiller says. "How can we tailor our facilities, services and resources to better support them and in the process define what libraries can do better than anyone else?"



Affelt has been at Lexecon for 14 years and manages a staff of two. The name within the organization for Affelt's services is not "library," but Database Research Department, or DRD.

Affelt and her team respond to an average of 100 information requests per week. When requests exceed 100 per week, employees who made three or more requests that week become members of the "DRD Century Club" and are given candy bars. The program has been extremely popular. "We were trying to think of a way to document the DRD's volume and value as a profit center. It's nice to offer a metric instead of reciting statistics," said Affelt.

Hal Sider, Senior Vice President, has worked at Lexecon for 20 years, and is often a Century Club member.

"Amy and her team have specialized knowledge about available information and know how to access it. That enables us to get information more quickly and use information we otherwise wouldn't be able to put our hands on. That improves the quality of our work product, and is critical in a litigation environment where being a close second isn't a very good outcome," said Sider.

Customization of information is key at Lexecon. Affelt and her team do not just send information; they read through it and highlight important points. "Lexecon subscribes to more utes per query. If they spend 15 minutes searching and cannot find what they are looking for, she recommends that they contact the DRD. This allows employees to spend time on other work for Lexecon clients.

The DRD has worked to make its branding consistent across all communications, including newsletters, open houses, daily bulletin e-mails, e-mail addresses and subject lines of messages. The DRD name is visible on all of these pieces. The tagline, "The Internet: Free; Your DRD: Priceless," appears on newsletters and brochures.

Jessica Mandel, Vice President at Lexecon, constantly uses the DRD's services. "Many times, the DRD sends us information overnight in between days of testimony. Our litigators have even been known to receive a fax or e-mail from the DRD on their Treos™ in the courthouse," she said.

"Customer service is the crux of our jobs," said Affelt. "Our requestors take great comfort in familiarity and experience. They know that our goal is to help them get exactly what they need. My staff and I make it a point to be very accessible."

In addition to finding valuable information for Lexecon employees, Affelt and her team also know how to present it. "Amy and her staff send us information in the format most usable to us. They know how we use data," said Mandel.

"Amy and her team have specialized knowledge about available information and know how to access it. That enables us to get information more quickly and use information we otherwise wouldn't be able to put our hands on." -Hal Sider

than 20 databases because we must look at nearly every source to find the 'needle in the haystack' that may make or break a case," said Affelt.

Approaching employees instead of waiting for employees to approach them has been a major success. "If we simply tell people about our services, they may not always see an immediate application. But once we send an example of what we can do, they become interested," said Affelt. "Even if it is just in the elevator or the employee café, I try to ask people what they are working on. I read six daily newspapers and monitor many Web sites and I try to look for articles of interest. Our economists are so busy; I read the news so that they don't have to."

Affelt also created the 15-minute rule, by which research analysts are told to limit their Internet searching to 15 min-

Debbie Zimmermann has been a Lexecon employee for more than 20 years. She now manages 35 people, and encourages them to use the DRD's services. "If the DRD was not here, it would be a huge problem for the company. Amy and her team have been instrumental in changing the way things are done here."

Affelt has worked to differentiate her staff as researchers, and to show Lexecon employees that there is much more information available to them than what Google has to offer. "The library industry is constantly changing and evolving, and we must continuously think of ways to stay relevant in the Internet age," said Affelt.

Despite the DRD's best efforts, when Mandel was asked what she thought of Affelt's attempts to brand the library's services, she replied, "I just call it Amy. It works."

Making life easier

Library deflection

Set your resource sharing to automatically route requests you can't fill to the next lender

BY CARRIE BENSELER

ONE OF THE NEWEST PRODUCTIVITY FEA-

tures to OCLC's WorldCat Resource Sharing service lets you "deflect" interlibrary loan requests for materials your library does not have, or does not wish to copy or loan.

With deflection enabled, requests automatically move to the next lender, resulting in faster turnaround times and delivery of library materials to users. And library staff no longer need to manually handle these requests, which improves workflow and reduces the amount of time a request remains in "pending" status.

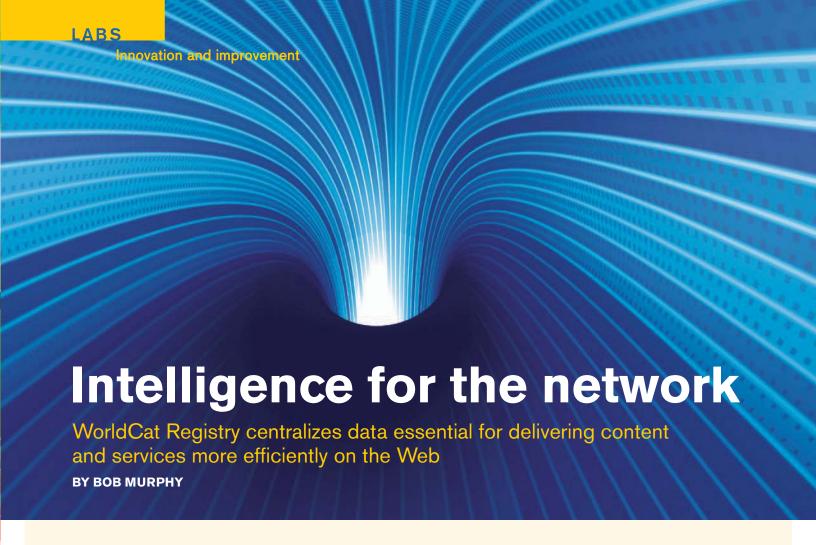
Libraries define their deflection criteria in their Policies Directory. Staff set up their systems to automatically deflect individual items or certain types of materials, such as audiovisuals, archival materials or eSerials. Deflection also can be used to allow lending only to certain library groups or consortia.

The Ohio State University Libraries implemented a per-title deflection policy in July. "We are now handling about 180 fewer requests per month because of deflection, saving us staff time" said Jennifer Kuehn, Head of Interlibrary Services, The Ohio State University Libraries. "Our fill rate has gone up and we can spend our time filling requests rather than handling requests we wouldn't be able to fill."

The policies directory feature was installed in June 2006. Already, more than 800 libraries have set up deflection policies for their resource sharing systems.

To view a step-by-step guide on how to implement WorldCat Resource Sharing deflection at your library, visit www.oclc.org/resourcesharing/support/enhancements/past.htm.





IN JANUARY 2007, OCLC WILL LAUNCH THE WORLD-

Cat Registry, a global directory for libraries, consortia, archives and museums and the services they provide. The Registry will help these institutions manage and share data that define their organizations—such as institution type, location, URLs for electronic services, circulation statistics and population served—through a single, authoritative Web platform.

Profile data in the Registry will support end-user access to a number of OCLC services, including FirstSearch, the open-Web version of WorldCat, and others. Later, as the Registry service expands, details such as branch library locations will enhance the ability of WorldCat on the open Web to connect users to the nearest library that holds an item-another step closer to making all libraries' holdings discoverable through WorldCat.

The Registry also helps solve an increasingly common administrative burden for libraries and library groups: keeping multiple institutional identities up to date across different internal and third-party applications and through a variety of methods, including Web interfaces, faxed paper forms and phone calls.

"Libraries, consortia and electronic content vendors all need to maintain current files of information such as computernetwork IP addresses, local administrative contacts and size of the user community," said Celeste Feather, Electronic Resources Librarian at The Ohio State University Libraries. "The problem for libraries is that they are expected to maintain this information in many places if they want to ensure reliable service. Vendors also need an efficient way to maintain this information in their systems."

"A centralized database such as the WorldCat Registry for this type of information would facilitate efficient sharing of critical information among many interested parties. If widely adopted, the registry service could provide a solution to a difficult workflow issue for librarians," said Feather.

Any institution or consortium—OCLC members and non-members alike—can use the Registry to share its profile with other libraries, technology vendors, e-content providers, funding agencies and other parties that could benefit from access. A Registry profile is shared via a special Web link that provides instant, read-only access to the most current data.

OCLC has prepopulated the Registry with automatically generated profiles for its member institutions and many others outside the cooperative. Upon release, the Registry will be the most comprehensive source of library and library service data in the world.

Exploring new offerings

It's so cool

WorldCat Selection connects publishers, librarians and selectors for seamless e-ordering of new library materials BY TOM STOREY

riday the 13th in February 2004 turned out to be a lucky day for Scott Wicks, Director of Library Technical Services at Cornell University. The rollout of a new library system he spearheaded went off without a hitch after a year of intense development and testing. It was called the Integrated Tool for Selection and Ordering at Cornell University Library, or ITSO CUL for short.

Today, after successful implementation on campus, the Cornell software is the concept behind a new OCLC service that promises to save libraries time and money in selecting and ordering new materials.

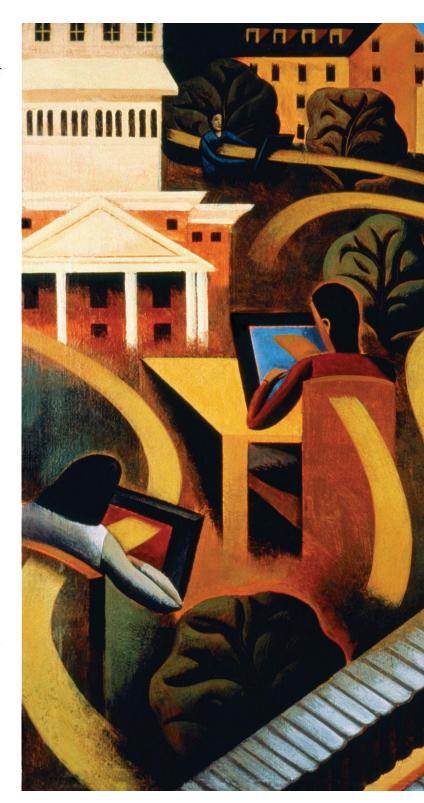
Based on ITSO CUL, WorldCat Selection, which debuted in December 2006 with Cornell staff as the first user, allows selectors of library materials to view new title data from multiple vendors in one central, comprehensive system. Libraries are able to get World-Cat records for newly purchased materials into their integrated library systems (ILS) early in the technical services process, as well as share selection decisions with others in their institutions.

Holding symbols can be automatically set in World-Cat at the point of order or added later in the cataloging process. Libraries using the service also can opt to receive upgraded WorldCat records at no additional charge using the Bibliographic Record Notification service.

Wicks estimates that the ITSO CUL software accounts for 40 percent of Cornell's firm orders and saves the library approximately \$100,000 per year in staff costs. He hopes OCLC libraries experience similar productivity enhancements and reduced costs with WorldCat Selection.

"A thorough business case analysis indicated that while demand existed for the product, our library was not well-positioned to be a software developer for other institutions," Wicks said. "Partnering with OCLC, we will grow this software to its full potential for the library community."

Selection is part of OCLC's effort to make WorldCat a leading tool for collection management and help member libraries work more efficiently and collaboratively in the selection process.



For many libraries, current selection and ordering workflows are cumbersome and labor-intensive. Libraries order from numerous companies and must use each vendor's system independently, which requires rekeying and importing data from multiple sources. Some libraries still use vendor-provided printed forms and paper slips to select and order materials.

In OCLC market research, libraries identified the most inefficient parts of their selection and ordering processes:

paper orders, standing orders, the selection process, cross-checking titles, manual transmission of orders to acquisitions, out-of-print searches, and communication between selectors and staff to get the orders into the ILS.

WorldCat Selection provides paperless selection of materials and recycles the bibliographic data used in the review process to support ordering and cataloging. It enables all selectors at an institution to see everyone's selection decisions, which helps avoid unintentional duplication or material acquisitions. The data exported to the ILS includes data such as vendors, funds, prices and notes to help with the process of creating purchase orders.

Here's how WorldCat Selection works:

- Material vendors notify OCLC of notification items for libraries that subscribe to the service.
- OCLC loads the items into WorldCat Selection.
- Selectors log into WorldCat Selection to view notification items for their collection area, viewing WorldCat records with additional institution-only data from multiple vendors in one system.
- Selectors take actions, such as select, reject, forward to another selector or defer.
- Acquisitions staff export WorldCat MARC records for all selected items from all selectors and all vendors, load them into the ILS and complete the order electronically from the ILS.

Selection offers three levels of user authorization: administrators set up institution-wide options including mapping data to tags in MARC records and defining call numbers and keywords used to distribute records to selectors; selectors view presorted items in their subject interest and take actions such as select, reject, forward, defer; acquisitions exports selected records into the local library system.

Existing partnerships between libraries and their materials vendors do not change. Libraries continue to partner with materials vendors to create profiles of new materials to be selected for library notification.

Three library materials vendors, Harrassowitz, Casalini Libri and Aux Amateurs de Livres International, began participating in the service in December. Additional vendors will be added in 2007. (Go to www.oclc.org/selection/partners to view a listing of vendors.)

In the future, data from WorldCat Collection Analysis will be imported into the Selection service so items that represent collection gaps can be distributed automatically to selectors for consideration.

"We believe that this collaboration between Cornell, OCLC and materials vendors has the potential to help institutions further streamline their technical services processes as well as reduce costs," said David Whitehair, OCLC WorldCat Selection Product Manager. "Ultimately, the WorldCat Selection service will benefit all library users who depend on new materials to advance their work and enhance their library experience."

To learn more about WorldCat Selection, visit www.oclc.org/selection.



RLG Programs: The next chapter

Managing the collective collection, renovating descriptive practices and modeling new service architectures are priority areas

BY NANCY ELKINGTON



LG and OCLC combined on July 1, 2006. These two independent and mature nonprofit organizations had similar missions: OCLC was devoted to supporting the needs of libraries and their users while RLG was focused on supporting the needs of research repositories, including libraries, archives and museums. Both entities engaged with an international membership; both operated an online services array; both cared deeply about how technology could be harnessed for the betterment of information providers and seekers. Bringing OCLC and RLG together is achieving the twin goals of eliminating duplicative service infrastructures and better serving the needs of our shared community through the amplification of staff effort.

As in the past, RLG Programs is made up of partner institutions that choose to affiliate with the group. Partners pay annual dues, participate in programs and initiatives and contribute effort, expertise and data in order to advance the common agenda. The current partnership is comprised of about 145 libraries, archives and museums in North America, Europe, the Middle East and the Pacific Rim. The common thread? A focus on support for the research needs of scholars, students, teachers and citizen-learners and a preference for early, collective action on shared challenges.

Since July of this year, RLG Programs and OCLC Research staff have been working together to develop an agenda that reflects the needs of the community, builds on existing expertise and expands the community's ability to act in concert to shape the future. The major benefit from the combination is our ability to bring the strengths of both staffs to bear on an array of initiatives from which the entire community will profit.

The new agenda is currently focused around three primary challenges: the need to manage the collectively held global collection, the desire to renovate descriptive and organizing practices, and the imperative to model the kinds of services infrastructures needed to support new modes of research, teaching and learning. Underpinning these are the means by which we can ensure the maximum reach of the effort invested in the three areas: through the development and promulgation of appropriate architectures and standards and through ongoing efforts to understand and assess user behaviors in a time of unremitting change.

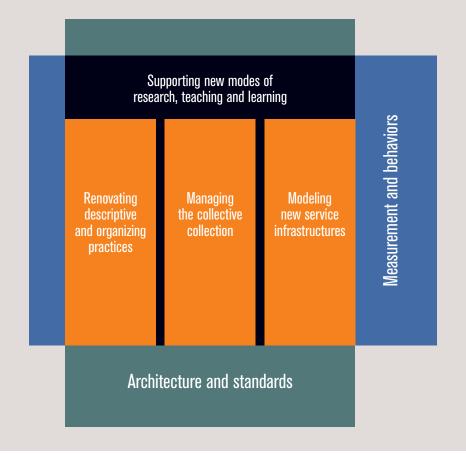
What does it mean to "manage the collective collection"? If we consider the holdings of cultural repositories worldwide in the aggregate while also contemplating the changing patterns of user behaviors, we quickly arrive at the need to think about more effective ways to help libraries, archives and museums act cooperatively in acquiring, managing and disclosing information about their collections. We will be exploring and working with partners in a range of areas:

- developing frameworks for a more dispersed contribution network for mass digitization efforts;
- developing new ways of thinking about cooperative off-site storage;
- developing new methods for making data about holdings support institutional management decisions;
- exploring new models for resource sharing in the context of network-level discovery processes; and
- experimenting with new modes of delivery that are location-independent and inclusive.

What does it mean to "renovate descriptive and organizing practices"? Our collective traditions of metadata creation extend across types of institutions and formats of physical and digital materials. Investments over time have included a variety of tools that serve to streamline our work: terminologies, gazetteers and name authority lists,

What is a "program"?

A program is an organized set of activities designed in response to expressed needs within the community. Although a program may include prototyping, it is not by definition necessarily a precursor to new service development. A program can include dedicated groups of partners that come together in order to agree on common practices, advance collective best thinking around a particular challenge, or recommend community action in a specific arena.



to name a few. The next set of challenges converge around the need to gain more efficiencies in this vast enterprise by harnessing the power of the Web. Part of the necessary exploration will be to determine how we can change the economics of metadata creation at research institutions, how to model the attendant work flows and how to set new expectations for return on investment. Some of the areas we'll be working on with our partners are:

- assessing and evolving classical approaches to bibliographic and archival description;
- repurposing legacy descriptions for contemporary and future discovery systems;
- aligning new approaches to collection description with participation in large scale digitization;
- developing tools and methods for more efficient description of digital objects; and
- supporting discovery of images and other digital objects and collections in major search engines.

What does it mean to "model new service infrastructures"? If we are serious about helping our communities to find the best and most effective means of supporting new modes of research, teaching and learning that are already taking shape, we need to act quickly. Systems and services are already being redeveloped to take advantage of the constant presence of the network in the lives of learners and

scholars. A range of new repository, discovery, resolution and disclosure frameworks are being put into place at OCLC as well as elsewhere. We want to help libraries, archives and museums achieve a common understanding of the processes for which they should be responsible, demonstrate these new frameworks through prototypes, and make them possible through the development of open-source code and architectures. We'll be working with partners to reach consensus around:

- what processes should remain focused at the local level and which processes can be better carried out at the group, national or international level;
- where sharing metadata and digitized objects can happen most efficiently;
- what decision-support methods come into play when an institution must decide whether to offer access to a resource freely or charge a license fee; and
- how best to support digital collections, describe digital content and support direct delivery of digital objects.

In the coming months, we'll be setting up a variety of advisory and working groups and we'll be building a new Web presence to reflect the work being undertaken. Progress against our objectives will be visible to all and, as always, the fruits of our work will be freely shared with the wider community.



Reloaded and revamped

AN ENHANCED VERSION OF THE EDUCATION

Resources Information Center (ERIC) database with additional access points is now available on the OCLC First-Search service. The reloaded database contains three new fields that ERIC introduced in 2005 for materials published in 2004 onward.

- The Education Level field identifies the specific education community for which the resource is intended and can be searched in the advanced and expert interfaces. Previously the information was included as a Descriptor.
- The Peer Reviewed field indicates if a journal is peerreviewed and can be used as a search limiter or as an index in the expert search mode.

The Reference Count tag is the number of references in an article. This information previously had been included in the Abstract.

ERIC provides access to more than 1.2 million bibliographic records of journal articles and other education-related materials and, if available, includes links to free full text. Covering 1966 to the present, ERIC indexes 630 journals and documents from 350 organizations and includes journal articles, books, conference proceedings, technical reports and other education-related materials. ERIC is sponsored by the U.S. Department of Education, Institute of Education Sciences.

Learn more about the ERIC database on FirstSearch at www.oclc.org/firstsearch/content/databases.

Highest OCLC record number (as of December 1, 2006) Languages in WorldCat 76,883,913

476

Watch WorldCat grow-a new record and 13 new holdings are added about every 10 seconds: www.oclc.org/worldcat/grow.

Format	Number of records	Percentage of total	Locations of items cataloged
Books	58,211,028	84.53%	988,936,189
Serials	2,838,140	4.12%	32,188,388
Visual Materials	2,189,113	3.18%	21,262,886
Maps	1,070,471	1.55%	4,841,004
Mixed Materials	314,749	0.46%	295,275
Sound Recordings	2,308,072	3.35%	26,055,062
Scores	1,605,264	2.33%	10,734,053
Computer Files	327,852	0.48%	1,326,109
Totals	68,864,689	100.00%	1,085,638,966
as of October 2006			

The OCLC Cooperative

Governing Members	9,413
Members	20,566
Participants	28,534
Libraries outside the United States	11,133
Countries and territories served	113

BY THE NUMBERS

Having fun with figures



230.9

Meters above street level of the world's highest library, housed in the JW Marriott Hotel in Shanghai, China

Source: www.guinessworldrecords.com/records/ science_and_technology/structures/highest_ library.aspx



Percent of Internet users who have downloaded a podcast

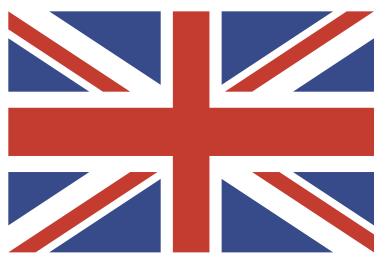
Source: www.pewinternet.org/pdfs/ PIP_Podcasting.pdf



New books published in 2005 in the United Kingdom, the world's leader in book publishing

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Source: www.bowker.com/press/bowker/2006_0509_bowker.htm





1,286,000

Dollar value of a grant awarded to OCLC by the Gates Foundation to research a national library marketing campaign

Source: www.oclc.org/news/releases/200643.htm



Going on the road



OCLC will be exhibiting at the following events:

American Library Association Midwinter Meeting January 19–22, 2007
Seattle, Washington

Ontario Library Association January 31-February 3, 2007 Toronto, Ontario

College Art Association 2007 February 14–17, 2007 New York, New York

Online Northwest February 16, 2007 Corvallis, Oregon

Alaska Library Association February 22–25, 2007 Juneau, Alaska

WebWise 2007 February 28-March 2, 2007 Washington, D.C.

Association of Asian Studies March 20–25, 2007 Boston, Massachusetts

Visual Resources Association March 27-April 1, 2007 Kansas City, Missouri

Association of College & Research Libraries March 29-April 1, 2007
Baltimore, Maryland

Check the OCLC Web site for a complete list of upcoming conferences.

www.oclc.org/education/events/



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