How can we demonstrate value by looking to the future?
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### Resource Sharing Statistics

- **10,196,169** Interlibrary Loan (ILL) requests entered into WorldCat Resource Sharing
- **3,135** Number of ILL Fee Management (IFM) service participants
- **$59,284,320** Estimated savings in administrative costs by using IFM, based on the online calculator of IFM savings
- **10,399** Number of libraries using WorldCat Resource Sharing
- **988,072** Number of IFM transactions
- **1,156** Libraries using ILLiad Interlibrary Loan Management Software

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*IFM lets you reconcile resource sharing charges and receipts directly through your monthly OCLC invoice, eliminating invoices and check writing to individual lending partners.

#### Top 10 Serials Requested Using WorldCat Resource Sharing

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<th>OCLC Number</th>
<th>Title</th>
<th>Requests</th>
<th>Holdings</th>
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<td>Personality and Individual Differences</td>
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<td>Social Science &amp; Medicine</td>
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#### Top 10 Monographs Requested Using WorldCat Resource Sharing

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<td>3,146,922</td>
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PRESIDENT’S REPORT  A word from Jay Jordan

Looking back, looking forward

2011 will mark a significant milestone for the OCLC cooperative: the 40th anniversary of the WorldCat bibliographic database.

On August 28, 1971, OCLC founder Frederick G. Kilgour and 54 Ohio libraries launched WorldCat (the OCLC online union catalog and shared cataloging system). It is tempting to state, “and the rest is history.” That, however, would be inaccurate, because WorldCat has always been about the future—the next series of enhancements, the next platform, the next record, the next holding.

The First Law of Technology says we invariably overestimate the short-term impact of new technologies while understimating their longer-term effects. Let me present WorldCat as “Exhibit A.”

In the first year of operation of OCLC’s shared cataloging system, libraries used WorldCat to produce 3.4 million custom-printed catalog cards. The short-term impact of WorldCat as a source of catalog cards was widely heralded around the library community. By 1985, card production peaked at 131 million cards. Last fiscal year, OCLC printed just 1.6 million catalog cards.

I submit that we are just beginning to grasp the long-term implications of WorldCat. While libraries no longer use WorldCat very much for catalog cards, the database touches almost all aspects of library operations. OCLC Research has been looking at ways to make the data in WorldCat work harder for libraries and their users. For example, OCLC researchers developed WorldCat Identities, which creates a summary page for the more than 25 million personal and corporate WorldCat items related to that location within a specified radius.

Another way that we are tapping into the riches of WorldCat is through the Developer Network. Since 2008, approximately 70 developers working with OCLC Web Services staff have built more than 60 applications that are shared worldwide. These apps and others are accessed more than 10 million times a month.

OCLC has recently released WorldCat Mobile beta, which integrates WorldCat.org into the consumer wireless space and helps libraries appeal to the ever-growing audience of mobile device users. WorldCat is central to our new Web-scale Management Services (WMS) in which library management functions such as acquisitions and circulation are delivered in the Internet cloud. Up-to-date WorldCat holdings are critical for libraries that will use these new services.

I am pleased to report that on September 27, 2010, The Samuel Roberts Noble Foundation, Ardmore, Oklahoma, became the first library to implement the production version of WMS. On November 9, 2010, the BIBSYS library consortium in Norway announced that it will partner with OCLC to develop a new library management system for the consortium’s 100 academic libraries and the National Library based on WMS. In the meantime, we are now implementing a limited number of early adopters and preparing for a major launch of WMS in the coming year.

Libraries in the OCLC cooperative continue to move ever closer to the dream of a digital library that integrates library functions into a unified whole and which provides information to people when and where needed. As WorldCat enters its 40th year, it is still about the future.
In the current economic climate, every dollar spent in support of libraries—whether public, academic, school or special libraries—is being more closely scrutinized than ever. In these circumstances, value calculations and Return on Investment (ROI) tools can provide powerful arguments for continued funding. In most cases, a snapshot of the value that your library provides will necessarily look backward, taking into account current services and resources. But are there ways to calculate value going forward?

In 2006 at a conference in Charlottesville, Virginia, John Lombardi, then Chancellor of the University of Massachusetts Amherst, challenged librarians to come up with a bold and exciting plan for the digital age—a plan with clear goals and objectives, one that would meet the university’s future needs in a purposeful way. Otherwise, he said, they would face continuing questions regarding their relevance and a declining share of the university budget.

As we reach 2011, John’s call to action is even more relevant. Libraries are under mounting pressure to show their effectiveness and quantify their value—particularly in today’s tough economic environment. Up against popular search engines and Internet research services, as well as competing departments and organizations, libraries need hard evidence that demonstrates their impact.

We in the library community know that libraries play an important role in our schools, universities and communities. We see it almost every day. And most of us would agree that libraries are not failing to produce value. But in today’s economic malaise, what we know may not be as important as what we can show.

More and more frequently, stakeholders and funding bodies are demanding metrics in order to evaluate performance and determine value. A new culture of value measurement is emerging to meet this challenge both now and in the future to position libraries as a vital element in community greatness.

How valuable can libraries become?

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A brief history of library ROI

ROI and value calculations have been used for decades to provide a solid, logical rationale for library funding and support. Special libraries and public libraries have been doing research and studies in this area for nearly 20 years. Academic libraries began studying value measurement in the 1970s with a sharp focus on ROI beginning in 2000.

In the public library community, the Massachusetts Library Association, The Chelmsford Public Library in Massachusetts and Maine State Library first devised a library use calculator that many public libraries have adopted to promote their value. The calculator uses estimated retail costs for 15 library services, such as items borrowed and computer use, to determine the value of individual library use and to calculate return on investment of local dollars.

Also, studies in Florida, Pennsylvania and South Carolina determined that for every tax dollar received, public libraries returned between $4.48 to $8.32 in value to the state’s economy.

Donald W. King, Honorary University Professor, Bryant University, who was involved with two of the three studies, has been a part of more than 70 library-related ROI studies, as well as research projects determining the value of information provided by the Census Bureau, the IRS, the Defense Document Center and NTIS.

An award-winning statistician, Don says that one of the tools he uses to determine return on investment in public and special libraries is contingent valuation, a common tool used to evaluate nonpriced goods and services by examining the economic implications of not having them.

“We asked the question, if you didn’t have a library, how much would it cost users to get the information they need?” Don says. “This is just an economic indicator; it’s not absolute, but it’s a very good indicator. We asked people if they didn’t have the library, what would they do? There is always about 20 percent who wouldn’t do anything, but most would find an alternate information source, which involves time and money.”

Donald W. King

Studies in Florida and Pennsylvania also used an economic input-output model called REMI (Regional Economic Models, Inc.) that provides a means of estimating the impact of libraries on other economic sectors. This model extends economic analysis beyond actual users of the library to a set of direct and indirect effects that libraries cause. For example, in Florida in 2010, it was estimated that for every dollar invested:

- gross regional product increased by $15.57; and
- wages of Florida workers increased by $22.97.

In addition, for every $3,491 invested in libraries, one job is created, demonstrating the increased importance of public libraries during the current recession.

“Libraries make an economic contribution by just being there,” Don says. “Salaries and wages of staff and purchases they make increase economic activities. After visiting the library, patrons use other services in coffee shops, restaurants, banks—all of these retail activities go up. There was a study done in the U.K. that looked at the economic effect on businesses when a U.K. library shut down on strike. Revenues at retail establishments nearby went down 23 percent. We call that the halo effect.”

The potential impact a public library can have on economic development cannot be overstated. Alex Fisher, President and Chief Executive Officer, The Columbus Partnership, says his experience as Deputy Governor of Tennessee, where he led Tennessee’s economic development efforts, taught him that good public libraries can attract businesses to a city. Case in point. He was competing with two other states for a company expansion, which Tennessee eventually

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won. The reason? A fabulous, new downtown library. A consultant on the company’s real estate site selection team told him that, “Any time our firm has a close consultant on the company’s real estate site selection team, we hang out at the library in each community to get a true sense of the values of that community.”

Local library. We hang out at the library in each community, and in the future, we must recast our image of libraries. They have always been at their best when they have not merely been dead-tree collection sites, but instead have been collective intelligence centers.”

The soft side and the hard side to demonstrating value

Phil Sykes, University Librarian at Liverpool University and Chair of Research Libraries U.K. (RLUK), a consortium of 29 research organizations in the U.K. and Ireland, including the three U.K. national libraries, says that there’s a soft and hard side to demonstrating value. The soft side is about refuting a growing narrative of library decline that has taken hold in the minds of newspaper editors and some university senior managers.

“The basis of that negative narrative is that, with the widespread availability of information on the Internet, libraries have begun to shrink in importance and use,” Phil says. “Actually, we already have bags of evidence that paints a much healthier, thriving and positive picture of university libraries.”

For example, U.K. libraries can point to SCONUL annual statistics that show a 130 percent increase in access to documents over the last few years, including a 17 percent rise in book issue. In addition, RLUK members can document an 8 percent increase in number of students using their libraries this year as compared to last.

“Today and in the future, we must recast our image of libraries. They have always been at their best when they have not merely been dead-tree collection sites, but instead have been collective intelligence centers.”

Students are very satisfied with U.K. libraries, and the only elements of university provision they think more important than libraries are teaching quality and research output,” Phil says. “We need to assemble what evidence we have and deploy it effectively, and in the right form, to the right audience to shift the narrative about libraries from negative to positive.”

The harder and more rigorous side of demonstrating value is about coming up with analytical and statistical techniques that link what libraries do with the desired outcomes for a university—successful students for example, or high-quality research.

Although work of this kind has been going on for at least two decades, we haven’t found the philosopher’s stone yet,” Phil says. “We have unearthed useful correlations, but it’s difficult to prove the direction of causation.

The Research Information Network has given us convincing evidence that levels of journal provision correlate with research success; CIBER at UCL has unearthed evidence that journal usage levels probably drive research success to a strong degree; and Huddersfield University has shown that there is a strong correlation between the level of use of library materials and degree classification.

A current project at RLUK is also yielding some interesting conclusions: that student satisfaction correlates strongly with library size and the amount of information skills received for example. But with all these things, it’s difficult to prove definitively that the library ‘input’ causes the institutional output.”

Libraries as collective intelligence centers

Trying to come up with ROI and value measurements for 2020 takes a certain amount of forecasting and future gazing. What will libraries look like in 2020? What should they look like?

Remove the shelves and take away the books says futurist Janna Anderson, Associate Professor and Director of the Imagining Intelligence Centers. “Today and in the future, we must recast our image of libraries. They have always been at their best when they have not merely been dead-tree collection sites, but instead have been collective intelligence centers.”

Human knowledge has always been the value sought, says Janna. Books on paper are generally no longer the ideal way to find that knowledge; the world is moving too quickly. Accelerating change requires a paradigm change.

Janna says that libraries today should strive to create a space that fosters intellectual expansion, where learners can consult specialists with the ability to quickly access specific deep knowledge resources. And all the while, live locally but think globally.

Phil Sykes

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Janna says that libraries today should strive to create a space that fosters intellectual expansion, where learners can consult specialists with the ability to quickly access specific deep knowledge resources. And all the while, live locally but think globally.
"Librarians should be leaders in crowd-sourcing for problem-solving. They can be conductors who bring individual people and ideas together to create intellectual symphonies. What if every library was also a ‘home’ base for human resources in that community, for the knowledge leaders who could do live-streaming, online presentations that are also recorded for future use and stored on video/wikis that extend that conversation? We can do this today—see the TEDTalks and other resources now emerging. (For more on TEDTalks, visit www.ted.com/talks.)

Janna says that libraries that are reimagined as collective intelligence centers can also build upon a particular specialty, becoming global institutes or think tanks focusing on documenting and expanding upon knowledge of one particular type—keeping in mind that human sources and accurate, timely information is the key. Expert people from all over the globe could work together through a particular library to produce well-edited and constantly updated collective-intelligence works.

“Yes, Wikipedia comes to mind as an example—what if every library in the world had staff assigned to take on the responsibility of curating several particular Wikipedia entries?”

According to Janna, the first steps to imagining the ROI for your library in 2020 are:

- **Leverage your library beyond the building.**
  - A geographic location with shelves of books, DVDs and periodicals. A library is a global knowledge organization, with no walls, shelves or parking spaces required.

- **Consider warehousing (nearby and available for next-day checkout) any items in the collection more than three years old that have not been checked out in the past two years—especially if they are available free online. Be ready for the day when you literally have no hard copies of any items—everything is available digitally.

- **Extend your outreach.** Consider making new staff hires based on the fact that you need interactive media project coordinators who can use new tools to make sense out of information for the general public.

- **Plan to be an information center that specializes in a topic or two in addition to being a central location for accessing general knowledge.** Build upon that by collecting information in new ways to share with the global public.

- **Reimagine your role.** Knowledge is no longer a scarce resource; your constituents need your help to focus on the best ways to access and use knowledge in order to create more knowledge, bring more clarity and solve global and local problems.

“Everyone used to know what a library was. But there are no agreed-upon parameters for this digital onslaught.”

“As libraries succeed in demonstrating their centrality to the expansion of student and faculty online activities, universities will have to make the critical investments needed to support a large-scale, library-based online enterprise.”

Are we “between two missions?”

Four years after his talk at the library assessment conference in 2006, John Lombardi, now President of the Louisiana State University System, sees the research library as a critical element in the future of universities in the digital age, though he’s not sure how the library will be precisely defined or what the evaluation parameters will be.

“Libraries have always referenced their functions to the critical missions of the university, and as those critical missions change or the methods for achieving them change, libraries will need to demonstrate that their skills and services are essential,” he says. “If you want a model, look at the Library of Congress. They do digital stuff exceedingly well, but it isn’t cheap. You need a lot of specialized talent that libraries are not used to.”

John sees librarians becoming providers and enablers, less expert-oriented and more service-oriented. “Their significance will have a service orientation. Kids, of course, are totally digital and computer-savvy. There is a simplistic factor at all. But they need skills at sorting what they get. Librarians can teach students and scholars to navigate what is important in this unruly and unmediated digital world.”

University libraries are struggling to respond to the rapid pace of technology and are trying to do multiple missions at the same time, John says. “They’ve got their traditional mission and the new digital mission and the new mission hasn’t settled down yet—it’s not entirely clear what capabilities they’ll need.”

Calculating ROI for the traditional mission of libraries involves measurements of cataloging, collection development and check-outs. Much of that, now, is being done by someone else, John says. In a new world, where libraries don’t have as much control over those functions, how do you determine value?

“We don’t know where it’s going,” he says, “or how it will end up. Anyone who thinks they do is just fooling themselves. There is instability in the environment. Everyone used to know what a library was. But there are no agreed-upon parameters for this digital onslaught.”

What would an administrator need from libraries in the future to move them higher in the funding stack? John offers these suggestions:

- **Identify elements and methods for measuring.**
  - Currently, there are few good measures of library performance with national reach and external validity.

- **Observe the indicators of effectiveness in the areas of research, teaching and preserving knowledge.**

- **Demonstrate how you support the research and teaching enterprise.**

- **Serve students in the expanding academic activities that occur online.**

“If researchers and teachers and students tell us that libraries are essential to their success, that is persuasive evidence of their relative importance within the university,” John says. “As libraries succeed in demonstrating their centrality to the expansion of student and faculty online activities, universities will have to make the critical investments needed to support a large-scale, library-based online enterprise.”
Future value: moving from library use to library impact

A recent report from ACRL outlines a new direction for library value measurement. The Value of Academic Libraries, prepared by Megan Oakleaf, Assistant Professor, Syracuse University, lists ten areas where research needs to be done to show the library’s distinct impact on users. It is a subtle but key shift moving from measuring library use to showing how libraries play a vital role in fundraising and student and faculty recruitment, retention and success—be it graduation, tenure, GPA, job placement or publication.

The information landscape today is a crowded space. The library is competing—for money and mindshare—against other departments, other public entities and commercial information services. The competition happens in the open marketplace, not in some protected, rarified sphere.

The library needs to produce value that commands funding, to show it is more about than information—it is a source of impact and support and transformation for its users and communities. Since issuing the report, ACRL has turned its attention to strategies for pursuing the research agenda Megan recommended, identifying funding sources for projects, and developing training and support materials for its members.

“The exciting part of demonstrating academic library value is the chance it gives the profession to not only examine the value we’ve already created for our institutions, but also to expand that value through developing new services and improving established ones,” says Megan. “The exploration of library value is only partially about our past; it’s primarily about our future.”

The research agenda

The ACRL report lays out ten specific areas that need further research to show the library’s impact on the mission of the university. The areas are:

- How does the library contribute to student enrollment?
- How does the library contribute to student retention and graduation?
- How does the library contribute to student success?
- How does the library contribute to student achievement?
- How does the library contribute to student learning?
- How does the library contribute to the student experience?
- How does the library contribute to faculty research productivity?
- How does the library contribute to faculty grant proposals and funding?
- How does the library contribute to overall institutional reputation or prestige?

Picture what your success in 2020 looks like

While, as John Lombardi says, no one can predict with certainty the library environment in 2020, we can be assured of one thing: it will be different than today. Probably radically different. Whatever measurements your value or ROI calculations are based on today, they are almost guaranteed to shift and transform. Picking any one element of change in the information landscape—the growing popularity of e-books, the rise of social search, the increased use of smartphones—isn’t the point. What matters is that there be a way to demonstrate your library’s value no matter what technology, services and cultural issues are in play.

If, in 2020, you can look back and say, “These are the ways we have helped our constituents and our community thrive,” you’ve got a better chance of maintaining—and improving—your funding sources. Make the ROI calculation part of the process by which you roll out new programs and services. That way, in ten years, you’ll be able to quantify all the great, new things your library has been doing.

WorldCat: Window to the world’s libraries

All Music Guide, Rovi add music metadata

OCLC has beefed up more than 250,000 pop and classical record entries in WorldCat, thanks to a new partnership with All Music Guide and Rovi. Here’s a sample of some of the new things you’ll find: additional descriptions, genres and styles, release dates, tracks, AMG top track picks (for pop music), ratings and reviews (for pop music), and cover art.

It means your users will now know more about the music they’re looking at, with recommendations, tracks and times, reviews and more.

British Library adds 12 million records

The British Library first began adding UKMARC records to WorldCat in 1985. Since then, some 4.5 million records from the British Library have been added to WorldCat. Now, not only has the number of records tripled, but the quality and accuracy of the records has been significantly enhanced. Ongoing automated batchloads will further improve British Library records in WorldCat.

For more information, visit


Biodiversity Heritage Library adds materials

More than 14,000 records that link directly to full-text, digitized materials on the Biodiversity Heritage Library (BHL) Web site are now a part of WorldCat. These records are from 12 prestigious institutions and, prior to digitization, were housed within each BHL institution, existing in isolation, available only to those with physical access to the collections. The BHL is a consortium of major natural history museum libraries, botanical libraries and research institutions organized to digitize, serve and preserve the legacy literature of biodiversity. It is part of The Encyclopedia of Life, a global effort to assemble information on all living species known to science into one ever-expanding, trusted, Web-based resource.

For more information, visit


WorldCat.org adds links to library content on Amazon

A special buy-it button that connects consumers to library-provided content on Amazon.com is now available on WorldCat.org. The new button links to public domain books from Cornell University and the University of Michigan. The books are available on a print-on-demand basis.

For more information, visit

Geek the Library in action
The story of Shelbyville-Shelby County Public Library
BY LINN HAUGESTAD EDVARDSEN

It’s not every day that you see a public library director at the local high school football game waving a sandwich board inviting people to write what they are passionate about—what they “geek.” But if you ask residents of Shelbyville, Indiana, they would tell you this is nothing out of the ordinary.

The Shelbyville-Shelby County Public Library was one of nearly 100 public libraries that piloted the Geek the Library community awareness campaign in 2009-2010, and Director Janet Wallace and her staff made campaign promotion a priority. Janet wore the “geek board” to many community events, including a homecoming parade—all in the name of educating her community about library funding and the important need for ongoing support. Her team’s efforts, and the campaign, were a hit.

“Geek the Library has been highly successful,” says Laura Guerin, Public Relations Manager at the library. “The campaign raised awareness of our financial needs and strengthened our partnerships within the community. More than anything, the quality of the promotional materials helped brand the library as progressive and active.”

Like many public libraries across the U.S., Shelbyville-Shelby County Public Library has faced substantial budget cuts in recent years. Geek the Library provided a unique opportunity for the library to build awareness about its financial needs and to create exposure about library services. “It enabled us to partner with different organizations, and strengthened our existing relationships with local officials and organizations,” Laura says.

The pilot campaign was designed using a multipronged approach, including newspaper and radio advertising and public relations, as well as participation in community events. The library took advantage of all campaign resources in promotional efforts, but also found innovative ways to use in-house graphic design capabilities and worked with a local printer to create additional material. At launch, the library team notified schools, local businesses and city officials, educated them on the campaign and asked for their support.

“‘This campaign provided a unique opportunity for the library to build awareness about its financial needs and to create exposure about library services.’”

The campaign’s simple design made it flexible, Laura says. As a result, they were able to localize the campaign and cater promotional materials to fit individual activities and community events. “At the local farmer’s market, we passed out geek bags to the vendors, so they could hand them to shoppers. At a high school homecoming football game, we were able to dress the mascot in an ‘I geek the Golden Bears’ T-shirt and toss geek shirts to the crowd. For Halloween, we made a library display with a skeleton that held a sign that ‘geeked’ books, used a geek wall as a backdrop for photos of kids in costume at our festival and handed geek bags to everyone who attended. For our annual Christmas Tea, we had ‘I geek holidays’ mugs to give to patrons. And, at a local trade fair, we handed out geeky glasses.

“We looked forward to figuring out ways we could incorporate the campaign into local events. We also enjoyed all of the additional opportunities to meet and interact with people in the community.”

Janet and Laura agree that the library’s increased involvement with schools was an incredible benefit from running the campaign. Teachers included elements of Geek the Library in lessons, and students created banners and posters, and helped spread the message to other members of the community, such as parents and local officials. The library also partnered with the local high school to create a promotional video. The video, which was completed by students and included local officials and business owners explaining what they geek, was broadcast at the school the week of launch.

Key objectives of Geek the Library include educating the community about the library and its funding, and encouraging support of the library’s vital role in the community—Shelbyville-Shelby County accomplished this. And in the process, library staff built critical connections with the public.

The promotional materials generated curiosity and opened conversation about the library, which allowed the team to communicate with the public on a personal level. “The more creative we got with the campaign,” says Laura, “the greater response we received.”

For more information, visit get.geekthelibrary.org
MEMBERSHIP UPDATE

The global cooperative in the Asia Pacific region

NextSpace spoke with Vic Elliott, Chair, OCLC Asia Pacific Regional Council and Director, Scholarly Information Services & University Librarian, The Australian National University, following the Asia Pacific Membership Conference in Tokyo, Japan in September.

What unique perspectives do librarians from the Asia Pacific region bring to the cooperative?

The broad geographical spread and the ethnic diversity of the membership do pose challenges for us. Just how do we work together to bring a coordinated approach to the matters and issues that concern us? I think it is fair to say that we are still exploring the options here, trying to find ways that work for us in all parts of our region. But it is also true that our diversity does mean that our perspectives on issues critical to the cooperative vary across the region and are often very different from those of our colleagues in the other regional councils. I, for one, find this breadth and variety of opinion and perception both valuable and refreshing and believe that increasingly, our voice will make an important contribution to what is now, after all, a global cooperative.

What are some of the challenges librarians face in the Asia Pacific region?

The extent and sophistication of libraries and library services vary widely across the region. In some countries, the information infrastructure available to libraries is highly developed and supports information services that compare favorably with those available in North America and Europe. Elsewhere, libraries and library services are in an early stage of development and lack the resources that most libraries in the developed world take for granted. This uneven playing field makes a single regional approach to current challenges unfeasible. Indeed, the challenges themselves differ within the region, from country to country. This lack of uniformity or consistency across our region can itself be seen as a strength, as something that allows the Asia Pacific Regional Council to make a vibrant contribution to the proceedings of Global Council and the cooperative. We will often see issues through a different lens or set of lenses. And that view, always important to us, may often prove invaluable to the cooperative at large, certainly at a strategic level.

How has the new governance structure extended participation from your region?

The opportunity the new structure gives us to meet together in person, at the annual Regional Council Membership Conferences and at irregular subregional or local meetings, is a great step forward. Such meetings encourage participation at a variety of levels, especially when the raising of issues or concerns is seen to lead directly to concerted action. At the first Membership Conference in Beijing last year, for example, delegates identified matters of concern such as the need for improved communication, a lack of understanding of local ways of doing business, barriers to the uploading of local records in nonstandard formats, restrictions applying to the piloting of OCLC products and services, the urgent need for differential pricing, and the sometimes muddled perception of OCLC as something other than the membership cooperative it really is. I am glad to say these concerns did not fall on deaf ears.

Subsequent discussion led to the formation in late 2008 of a Global Council Task Force on Cost Sharing and Pricing Strategy, whose membership included ChewLeng Beh, the founding Chair of our Regional Council. And the concern expressed by the Regional Council that OCLC’s status as a membership cooperative needed clearer definition and promotion fed directly into the then-current discussions about the need for the Global Council to revisit and reformulate the statement of values which should guide the work of the cooperative. Those discussions led to the adoption by Global Council, in June this year, of a revised statement, entitled the “Shared Values and Membership Principles of the OCLC Cooperative.”

I see these developments as proof of the efficacy of the new, devolved governance arrangements. Under the old structure, expressing and receiving acknowledgment of regional needs and concerns was much more difficult. The new structure has opened up lines of access and communication which just did not exist before.

How would you characterize the OCLC cooperative’s image in the Asia Pacific region?

The perception of the cooperative within the region varies in accordance with the nature of the presence OCLC has in particular countries. In some countries, OCLC has direct representation from a local office. In others, OCLC works through an established agency or company. And in others again, services are provided as a consequence of a formal agreement with the local national library. Inevitably, the perception and profile of the cooperative is shaped by the way in which libraries engage with OCLC on a day-to-day basis. Again, I think the Regional Council has a role to play here. By bringing our members together and enabling them to participate in Regional Council meetings and activities, we can encourage them to see themselves as members of a global cooperative rather than simply as recipients of services delivered locally.

What does cooperation mean to libraries in the region?

I think we would all agree that cooperation is seen to be the vehicle by which local libraries can enhance the services they provide to their user communities. By working together and sharing resources and expertise, our members can leverage regional strengths and thereby overcome local weaknesses. It is instructive that the theme of our first Membership Conference in Beijing was resource sharing and collaboration. As that conference showed, raising issues and concerns was not difficult. Identifying appropriate and sustainable initiatives in support of cooperation across our region was much more challenging. But it is a challenge we are determined to meet with the assistance of the global cooperative to which we all belong.

“By working together and sharing resources and expertise, our members can leverage regional strengths and thereby overcome local weaknesses.”

Vic Elliott, right, chats with Rich Van Orden, OCLC Global Council Program Director, and Jennifer Younger, President, OCLC Global Council. Chair, Board of Directors, Catholic Research Resources Alliance, and Librarian, University of Notre Dame.
Rethinking the boundaries of the academic library

The shift to network technologies will change the mixture of internalized and externalized library services

BY LAVOIE AND LORCAN DEMPSEY*

Speculation on the future of the academic library has been spurred by the idea that technological change has created opportunities to reconsider what libraries should do and how they should do it. Economic pressures have added urgency to these discussions as libraries face the necessity of leveraging technological change as a means of reconfiguring resource allocations in ways that allow them to do more with less in a lingering climate of austerity.

This article describes a framework to aid discussions about the future of academic libraries. The framework is built around the concept of transaction costs, which help organize thinking about the dynamic forces acting on and reshaping the library. The notion of internalized and externalized services provides an incentive to rebalance the mixture of internalized and externalized services through which organizations accomplish their strategic goals. The network is reconfiguring organizational boundaries everywhere, and academic libraries are no exception.

Cooperative cataloging is an early example of how the network has shifted the boundaries of the library. Computing and network technologies significantly reduced the cost of pooling cataloging output among libraries through online databases accessed through network connections. As online cataloging became available, academic libraries (as well as other libraries) were able to shift a considerable portion of their internal cataloging activity to an external cooperative network.

More recently, the network has reconfigured the boundaries of the library in regard to the scholarly journal literature. In contrast to print journals, e-journals usually remain in the custody of publishers rather than libraries, with access occurring over the network. Consequently, the day-to-day maintenance and long-term preservation of much of the scholarly journal literature—activities that universities traditionally internalized within their libraries—are now increasingly carried out by publishers or third-party services like JSTOR and Portico.

Several points about their framework and its treatment of the transaction costs framework and its implications are forthcoming soon.

Transaction costs are special costs involved in arranging for someone to do something for you rather than doing it yourself. Effort must be devoted to finding an appropriate provider or collaboration partner; agreement must be reached on the services that will be delivered, how they will be delivered, and at what cost; monitoring may be necessary to ensure that the terms of the agreement are observed by all parties. In short, interacting with outside parties entails costs—time, effort and money—to make the transaction work. Transaction costs are usually analyzed in the context of market transactions, but are also relevant to nonmarket interactions like collaborations with partners to collectively provide a shared service.

An academic library is a bundle of information-related resources and services that a university has chosen to provide internally, rather than transact for them with external parties.

A crucial factor in determining which resources and services to provide internally, and which to transact for externally, is the prevailing pattern of transaction costs. The higher the transaction costs associated with a service—that is, the greater the frictions in sourcing it with an external party—the more likely the university will choose to internalize provision of that service. In this way, the boundaries of the library are established: the demarcation between the information-related services the university chooses to provide internally, and those that it transacts for externally.

Transaction costs help explain why academic libraries look the way they do today, in terms of the current balance between internalized and externalized services. But they also provide insight into how the boundaries of the library shift over time. As the pattern of transaction costs change, so too will the boundaries of the library as the optimal mix between internalized and externalized services shifts accordingly.

The network reconfigures boundaries

A key driver currently shifting the pattern of transaction costs is the network. Much of society has been transformed by computing and network technologies that significantly reduce the cost of establishing and managing interactions with external parties. Reductions in the relative cost of externalization provide an incentive to rebalance the mixture of internalized and externalized services through which organizations accomplish their strategic goals. The network is reconfiguring organizational boundaries everywhere, and academic libraries are no exception.

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*The authors thank their colleagues Constance Malpas and Jim Michalko for their helpful comments.
Improving access to library materials

WorldCat Local adds one-click access to e-items

Direct links to full-text articles and open-access objects from brief results have recently been added to WorldCat Local and WorldCat.org. This enhancement was based on user testing and a variety of requests to add more functionality to brief results lists. It is also an example of library cooperation being leveraged to better meet users’ needs: when members add data about electronic content and linking to the WorldCat knowledge base, that powers the “View Now” link for everyone. This is true for unique, local content as well as major, multibibliographic projects like the HathiTrust.

WorldCat Local has also passed the 700 million mark in terms of the number of items that subscribers can access through the service. See sidebar for a list of all the materials now available through WorldCat Local.

What is the WorldCat Knowledge Base?
The WorldCat knowledge base provides a single, centralized place that connects data about your library’s electronic content and linking features to related OCLC services. WorldCat knowledge base information currently enables a “view now” link in both brief and detailed result screens for electronic materials in WorldCat Local and speeds the resource sharing workflow for articles. This functionality is incorporated at no additional charge into related OCLC services as part of your cataloging subscription. In the future, WorldCat knowledge base data will be available for use in other OCLC and non-OCLC services including OpenURL resolver, profiles to automatically set holdings for electronic materials, and an API for programmatic access to knowledge base data.

WorldCat Local libraries now have mobile views

Recently, OCLC made available a new mobile view for both WorldCat Local and “quick start” libraries. This is important, as the growth of smartphone use is climbing, and experts predict more and more users will be accessing information from mobile devices. The new, mobile-specific site for WorldCat Local is optimized for the Apple iOS and Android platforms, but any smartphone browser, including Windows 7 Mobile and BlackBerry, is supported. This “beta” mobile update is included with current WorldCat Local and “quick start” subscriptions at no extra charge.

For more information, visitwww.oclc.org/news/announcements/2010/announcement516.htm

WorldCat knowledge base helps libraries connect users to online articles, e-books with a single click

Until recently, it was not unusual for users to expect to wait for days when requesting an interlibrary loan of an article from another library. The process involved a number of manual steps, often requiring librarians to consult multiple systems to determine local availability. Now, major new improvements to WorldCat Resource Sharing and ILLiad make it possible to fill requests for electronic articles within hours, often on the same day as the request is made.

“We’ve been automating the interlibrary loan process for books since the mid 1980s,” says Tony Melvin, Product Manager for WorldCat Resource Sharing. “Now we can do the same thing for licensed materials, getting them into the hands of users much more quickly and easily.”

These improvements are based primarily on two additions to WorldCat—new knowledge base functionality and a license management tool.

How it works

• Users place article requests through WorldCat Resource Sharing or ILLiad.

• The bibliographic record for the requested item is located in WorldCat.

• The WorldCat knowledge base provides information about which libraries have access to the electronic article.

• If your library provides access to the article, the service sends the request to your review file with the URL for the item.

• If your library does not provide access to the article, your custom holdings setting determine appropriate lenders.

• Lenders that have added their local knowledge base data into the WorldCat knowledge base receive a request that contains the URL of the item in their collection.

• The license management tool determines whether and how a lender can loan the article.

• The lending library reviews the request, along with embedded information about usage rights for the material (“Send electronic copy,” “Print and send” or “Print and scan”).

In many cases, use of the new feature means that ILL staff can complete article transactions without ever leaving their desks. The knowledge base and license management functions work together behind the scenes to find the requested ISSN, match it against libraries that own the title, and then narrow the request to those that have the rights to loan it.

“Direct request for articles not only streamlined staff article processing procedures, but also enhanced our customer service,” says Barbara Coopey, Assistant Head, Access Services and Head, Interlibrary Loan, Penn State University Libraries. “Having the knowledge base and license manager in place reduced staff time spent on manually checking our Libraries’ catalog, databases and licensing resource. During the trial, 75 percent of our direct e-journal article requests were filled by one of the participating libraries within one day.”

“The statistics we’re seeing from early adopters of the service confirm our best-case estimates,” adds Tony. “People are able to get these materials delivered within a few hours rather than over the course of days. That’s a huge win for the library in terms of meeting users’ expectations for today’s information services.”

For more information, visitwww.oclc.org/resourcesharing/features/articles/
Web-scale Management Services … in their words

In October 2010, OCLC members involved as Web-scale pilots or early adopters gathered at the LITA (Library Information and Technology Association) conference in Atlanta, Georgia, USA. We asked them to share their thoughts about the new service. Their presentations were videotaped and are available for viewing on the OCLC Web site. Below are excerpts.

OCLC Web-scale Management Services offer member libraries a unified solution to help streamline routine tasks like acquisitions, license management and circulation. Moving these functions to the Web allows libraries to lower the total cost of ownership for management services, simplify critical workflows and free staff time for high-priority services and local innovation.

BY THE NUMBERS

Average improvement in key performance indicators (traffic counts, user productivity, use of specific features) when 10 percent of a Web site redesign project is invested in usability testing

By the end of 2008, 71 percent of Facebook users had posted content about an event

Average improvement in key performance indicators (traffic counts, user productivity, use of specific features) when 10 percent of a Web site redesign project is invested in usability testing

83%

$2.52

The value in ticket sales for an individual’s Facebook posting about an event

$1,700,000

The return on investment to the individual from a four-year degree at MIT

The return on investment to the individual from a four-year degree at MIT

BY THE NUMBERS

Statistics to think about

The value in ticket sales for an individual’s Facebook posting about an event

$4.38

Return in grant income for every $1 invested in the Library

www.useit.com/alertbox/roi.html

Features (traffic counts, user productivity, use of specific features) when 10 percent of a Web site redesign project is invested in usability testing

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Get together with OCLC Online and in person

OCLC Events

ALA Midwinter Meeting
January 7–12, 2011
San Diego, California, USA

Ontario Library Association
February 2–5, 2011
Toronto, Ontario, Canada

OCLC Europe, the Middle East and Africa Regional Council meeting
March 2–3, 2011
Frankfurt, Germany

JISC Conference 2011
March 14–15, 2011
Liverpool, United Kingdom

Computers in Libraries
March 21–23, 2011
Washington, D.C., USA

ACRL 2011
March 30–April 2, 2011
Philadelphia, Pennsylvania, USA

British Columbia Library Association
April 7–9, 2011
Victoria, British Columbia, Canada

OCLC Global Council annual meeting
April 11–14, 2011
Dublin, Ohio, USA

Check the OCLC Web site for upcoming conferences and events:
www.oclc.org/news/events/

OCLC blog listings

The OCLC Cooperative Blog
community.oclc.org/cooperative/

Lorcan Dempsey’s Weblog
orweblog.oclc.org

WorldCat Blog
worldcat.org/blogs

Hectic Pace
community.oclc.org/hecticpace

Hanging Together
hangingtogether.org

The Dewey Blog
ddc.typepad.com

Outgoing
outgoing.typepad.com/outgoing

BlogJunction
blog.webjunctionworks.org

A View of South America
community.oclc.org/
aviewofsouthamerica/

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on Facebook
www.facebook.com/pages/WorldCat/81565002545

Waseda University
Tokyo, Japan
Regional Council Meeting
OCLC Asia Pacific