



WorldShare ILL and ILLiad User Group ALA Annual, 29 June 2014 Summary of roundtable discussion

The discussion topic for the WorldShare ILL and ILLiad User Group meeting at ALA Annual was “ILL and electronic resources.”

All participants discussed responses to the following discussion questions.

1. Do you supply e-resources? What types—and how?
2. What tools and workflows do you use?
3. If you are a lender and don't supply from your library's e-collections, why not? What are the barriers and challenges?
4. If you are a lender that does supply from your library's e-collections, how do you achieve this?
5. How can the community get more libraries to lend from their e-collections?
6. How do you work with open access resources? What workflows do you use?
7. Have you used Occam's Reader? How did you find it? How would you like this project to grow?
8. Are there any ways OCLC can help with your e-resource issues and challenges?
9. Do you use the WorldCat knowledge base? What are the advantages and disadvantages?
10. How could OCLC's deflection feature be enhanced for e-resources?

Each roundtable reported to the group on its discussion. In general, many libraries represented lend articles as long as they have a secure way to deliver them other than email (examples provided were Article Exchange and RapidILL). Fewer participants loaned e-books, with loans of e-book chapters mentioned frequently by lenders. Public libraries often do not share e-resources; academic libraries typically share articles and chapters, but discovery is a challenge.

The primary themes of the roundtable discussions as reported by discussion leaders were:

- Challenges related to **e-resource licenses**:
 - In many libraries, it is difficult to locate current licenses for e-resources because they reside in multiple departments/locations.
 - Licenses for e-resources should be more transparent and understandable for ALL staff. We have an opportunity to work with e-content providers to improve clarity of licenses.
 - Importance of maintaining communication with library staff involved in acquisition and access to e-resources.
 - Work closely with library staff members who negotiate licenses, to make sure ILL use is addressed in licenses at the time of purchase.
 - Help license negotiators understand user needs so they are represented in license agreements.
 - Educate *all* library staff about characteristics of e-resource licenses.

- Use of the **WorldCat knowledge base** to facilitate sharing of e-books and electronic articles:
 - ILLiad users appreciate being able to view license terms within an ILLiad request.
 - Many attendees weren't familiar with how to use the WorldCat knowledge base; others gained a better understanding of how to use the WorldCat knowledge base from this meeting.

- **E-book platforms and workflows** related to the sharing of e-book content:
 - Many libraries appreciate being able to share chapters of e-books. Some participants fill requests for chapters only from Springer e-books.
 - General concern that e-book platforms that support much academic e-book content frequently do not meet user usability expectations or needs.
 - Users often specify "print preferred" even if item is owned in-house as an e-book.
 - Could we lobby for a NISO standard for e-book platforms?
 - There is a need for better workflows for lending e-books.
 - There were varying views of whether DDA is easier than ILL.
 - Participants asked whether consortial e-resource purchases are a help or a hindrance.

- Relationship between **libraries and publishers**:
 - Libraries and publishers have a symbiotic relationship.
 - Some libraries are now required to provide Elsevier with reports of requests from "international" libraries. This is a new requirement, and there is no general understanding of why this information must be reported.
 - One group made the statement, "We will find ways to legally share, with or without support from publishers."

- **Lack of integration** between libraries' e-resource management systems and interlibrary loan:
 - Workflows are disjointed because license information is managed in one system (an ERM) and ILL is managed in another.

- Thoughts on the **Occam's Reader pilot**:
 - Many are watching the pilot with interest.

- **Tools for delivering documents**:
 - Article Exchange was discussed as a good way to deliver documents requested through interlibrary loan.

- **Recommendations**:
 - General:
 - Recommend obtaining articles from the Reprints Desk. They deliver articles in two minutes, and the scope of their collection is large. They are also often less expensive than the Copyright Clearance Center.
 - Use OCLC's Article Exchange to deliver documents.
 - Use the LIBLICENSE-L listserv to stay up-to-date on this topic.
 - Take advantage of open access resources whenever possible.
 - Leverage the expertise of a group such as IDS when getting started with e-resource lending.
 - For ALA/RUSA STARS:

- Lead development of a standardized license template that could be adopted by multiple publishers/e-content providers.
 - Work together (through ALA? OCLC?) to develop “Licensing 101” training for librarians.
 - Provide a guide that would help librarians discuss issues related to the interlibrary loan of e-resources with colleagues in other departments of their libraries.
 - Encourage publishers to include ILL in e-resource licenses.
 - Sponsor a survey of which tools are being used to deliver documents. (For example, using Article Exchange instead of email attachments.)
- For OCLC:
 - Suggest that OCLC encourage publishers to include ILL in e-resource licenses.
 - Support efforts to educate staff throughout libraries about key elements in e-resource licenses. One group specifically mentioned helping library directors better understand the need to maintain access to licenses.
 - Provide libraries with the best possible discovery service, so users can find the e-resources available in library collections.
 - Provide talking points for negotiating e-resource licenses.
 - Suggestions related to deflection:
 - Need for greater granularity with respect to e-deflection.
 - Provide recommendations about how to manage deflection to support sharing of e-resources.
 - Provide an option to work around deflection on an as-needed basis, such as a one-time format lend.
 - In ILLiad, customize and append the cover sheet on the lending side with copyright information. This is already available on the borrowing side.
 - Partner with the Occam’s Reader group.
 - WorldCat knowledge base:
 - Provide an easier way for libraries to export data from Ex Libris Primo into the WorldCat knowledge base, because it isn’t in KBART format.
 - Provide easy ways for library staffs to add local data to the WorldCat knowledge base. (Some participants mentioned that they will not use Pubget due to its relationship to the CCC.)
 - Greater granularity in statistics related to format.
 - Sponsor ILL “user-type” discussions around conferences other than ALA Annual and ALA Midwinter.
 - OCLC Research partner with library school students on research related to interlibrary loan.

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