SHARES Meeting

Dennis Massie
RLG Programs

Biddle Law Library
University of Pennsylvania
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SHARES in the Past 18 Months

- Migrated away from peer-to-peer model
- Saw over 80 libraries change ILL systems
- Moved net lending functions to IFM
- Shifted discovery almost completely to WC
- Gained three new participants
- Lost five participants
- Kept doing what we’ve always done

- (now exhale)
RLG Union Catalog Records into WC

- Institutional records are retained along with master records within WorldCat.
- If you requested that RLG extract your records and send them to OCLC, your records were loaded by the end of the summer.
- Record extractions from local systems began loading in July.
- Many libraries have not yet extracted and sent records.
- The first contact by OCLC is to be within 90 days after receiving extracted records.
- A former RLG dataloads specialist is working with a group in Ohio to refine processes and tracking.
SHARES Executive Group: Finishing 2-year terms

- Jane Clark, University of Toronto
- Susan Currie, Binghamton University
- Jon Evans, MFA Houston
- David Larsen, University of Chicago
- Marjory Lobban, University of Edinburgh
SHARES Executive Group: Continuing 2-year terms

- Michelle Foss, Florida
- Jesse Koennecke, Cornell
- Merle Slyhoff, Penn Law
SHARES Executive Group: Projected Make-up for 2008

- Michelle Foss, Florida
- Jesse Koennecke, Cornell
- Merle Slyhoff, Penn Law
- Susan Currie, Binghamton University
- Marjory Lobban, University of Edinburgh
- Susan Stone, University of Toronto
- 3 new nominees
SHARES Executive Group: Projected Work Areas for 2008

- Survey partnership
- Develop SHARES marketing kit
- Bring Vision Statement up-to-date
- Review pricing structure

Also under consideration:
- Having a technical “lead” on SEG
- Explore ways to work with Office of Research
- Pro-actively seek to make SHARES a sort of workshop for trying new models and technologies
SHARES Practitioners Council

- Carol Brigham, Temple
- Debbie Heiden, Michigan
- Helen Insinger, Binghamton
- Carol Jones, Yale
- Mindy Kent, Harvard Law
- Aimee Lind, Getty
- Margarita Moreno, NLA
- Kristina Rose, NYU
Tightly Focused Working Groups (volunteers wanted)

- Rethink onsite access
- Restore detailed SHARES guidelines to Web site
- Investigate what’s not being filled
- Establish benchmarks for high performance lending
Sharing Expertise Working Group

- Jennifer Block, Princeton
- Barbara Coopey, Penn State
- Kristina Rose, NYU
SHARES Net Lending: Reports on Web (soon)

2005-2006 (12 months)
- 87,858 fills
- 114 libraries
- 80 institutions
- 31 net lenders
- 49 net borrowers
- $275,900 exchanged
- 3 <$100
- 24 <$1,000
- 53 <$5,000
- 13 > $10,000

2006-2007 (11 months)
- 66,612 fills
- 111 libraries
- 79 institutions
- 34 net lenders
- 45 net borrowers
- $221,610 exchanged
- 6 <$100
- 33 <$1,000
- 59 <$5,000
- 10 > $10,000
OCLC Programs and Research Update
Supporting new modes of research, teaching and learning

- Renovating descriptive and organizing practices
- Managing the collective collection
- Modeling new service infrastructures

Architecture and standards

Measurement and behaviors
Programs & Research: Combined Capacities

- Perform Research
- Develop Architecture & Standards
- Identify Best Practice
- Build Community
- Create Consensus
- Convene Experts
- Develop & Deploy
- Transfer Technology
- Produce Outcomes

Resources available to support this set of capacities for the community have doubled

Shared Uncertainties

Community Solutions
The RLG Programs approach:

- **Assess the landscape:** capture community priorities and trends through face-to-face encounters, working groups, interviews and data analysis
  - Group meetings, conference presentations, white papers

- **Strategize:** determine where community investment is most likely to contribute near-term value
  - “Calls to action”, internal and external advisory groups, participation in internal product planning

- **Collaborate:** work with partners to implement change at the local, group and global level
  - Formulate policies, prototype services, partner with external agencies to leverage collective assets
Hypothetical University

LAM Relationships

http://www.iel.msu.edu
Understand end-user behaviors
Changing Metadata Creation Processes

Baseline understanding of metadata practices – so many standards to choose from

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<thead>
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<th>Standard</th>
<th>Response Percent</th>
<th>Response Count</th>
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<tbody>
<tr>
<td>CDWA</td>
<td>6.3%</td>
<td>5</td>
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<tr>
<td>CDWA Lite</td>
<td>3.8%</td>
<td>3</td>
</tr>
<tr>
<td>Darwin Core</td>
<td>2.5%</td>
<td>2</td>
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<tr>
<td>DDI</td>
<td>1.3%</td>
<td>1</td>
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<tr>
<td>Dublin Core Qualified</td>
<td>29.1%</td>
<td>23</td>
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<td>Dublin Core Unqualified</td>
<td>26.6%</td>
<td>21</td>
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<tr>
<td>EAD</td>
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<td>33</td>
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<tr>
<td>FGDC</td>
<td>5.1%</td>
<td>4</td>
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<tr>
<td>MARC</td>
<td>63.3%</td>
<td>50</td>
</tr>
<tr>
<td>MODS</td>
<td>19.0%</td>
<td>15</td>
</tr>
<tr>
<td>SPECTRUM</td>
<td>2.5%</td>
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<tr>
<td>TEI</td>
<td>12.7%</td>
<td>10</td>
</tr>
<tr>
<td>VRA Core</td>
<td>21.5%</td>
<td>17</td>
</tr>
<tr>
<td>Other: Name below</td>
<td>31.7%</td>
<td>25</td>
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Leveraging vocabularies for discovery
Harmonizing digitization

- Expectations for mass digitization partnerships
- Bring special collections into large-scale digitization milieu
- Business intelligence to inform digitization decisions & use of digitized content
Public-Private Mass Digitization

Appearance

- They are non-exclusive deals
- The private partner bears all the costs
- Institutions are free to serve the content to users
- They are only limited term deals

Reality

- Exclusive “limited” to digital copies, but who will rescan?
- Participating libraries bear staff and opportunity costs
- Who are “our users”? Need to aggregate with content from other projects & partners
- Terms may be limited but restrictions aren’t
Shifting Gears, Getting into ‘the Flow’

The essay, like the forum, focuses on digitization and related processes, but intentionally does not encompass technical specifications for various formats, born digital materials, nor rights issues (which warrant similar essays for each topic). It intends to be provocative. Not all of the ideas presented here will apply to a particular situation, but hopefully they will stimulate consideration of appropriate ways to move forward.

Special collections are stuck in an eddy, while the mass of digitized books drift by in the current of the mainstream. We need to jump into the flow or risk being left high and dry.

1. Access vs. preservation—Access wins!

Many of our digital initiatives have stressed the importance of preservation, leaving access as an afterthought (the idea being if you capture preservation-quality, you can always derive an access copy). In reality, due to the very special nature of these often unique materials, we will always preserve the originals to the best of our ability. In light of recent programs for the mass digitization of books, if special collections and their funding continue to be marginalized, our administrations may not keep us around to attend to the originals.

In the past, we’ve soothed our doubts by repeating the mantra, “we’ll only get one chance to do it, so it’s got to be done right.” Experience has shown that that is not in fact the case. Often we do go back when the technology improves or when we better understand our users’ needs. We need to put on our helmets now and go for the biggest bang for the buck in terms of access.
Shared Print Collection Management

We live in a world where:

- more and more information is either born digital or being reborn digitally
- libraries are filled to the brim with print collections
- use of legacy print collections is declining while total print production continues to grow
- offsite storage is also filling up with print materials (with some new acquisitions going directly into storage)
- it may be cheaper to build a new storage pod than it is to weed collections stored in the old storage pod
- many libraries are buying and storing the same titles
- no one has an accurate idea of what anyone else is storing
- or of the physical condition of stored material

Got collaboration?
Shared Print Collection Management

Recent and upcoming activities

1. Develop data requirements and policy framework for distributed network of shared print repositories (with NAST)
2. “Last copies” analysis of ARL collections
3. Shared print collections summit – Nov 12-13
4. Apply what is learned from NAST and other efforts to SHARES environment
No. of facilities
Aggregate capacity
Current occupancy
(vol. equivalents)

<table>
<thead>
<tr>
<th>No. of facilities</th>
<th>Aggregate capacity</th>
<th>Current occupancy</th>
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<tbody>
<tr>
<td>5 facilities</td>
<td>5.9M vols.</td>
<td>47% full</td>
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<tr>
<td>7 facilities</td>
<td>20M vols.</td>
<td>71% full</td>
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<tr>
<td>3 facilities</td>
<td>7.4M vols.</td>
<td>59% full</td>
</tr>
<tr>
<td>5 facilities</td>
<td>18.4M vols.</td>
<td>69% full</td>
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<tr>
<td>9 facilities</td>
<td>17M vols.</td>
<td>78% full</td>
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<td>2 facilities</td>
<td>1.1M vols.</td>
<td>24% full</td>
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<tr>
<td>10 facilities</td>
<td>14.9M vols.</td>
<td>65% full</td>
</tr>
<tr>
<td>5 facilities</td>
<td>21.2M vols.</td>
<td>41% full</td>
</tr>
<tr>
<td>14 facilities</td>
<td>3.9M vols.</td>
<td>55% full</td>
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Shared infrastructure, data-mining activities

- eContent Synchronization
- Registry of Copyright Evidence
- Investigating ILL use patterns
- Comparison of collections of 4 NYC museums
Collaborative Collection Management

- **RLG Collections Summit** (November, 2007)
  Host: University of Pennsylvania
- Invitational meeting will explore cultural, technological and organizational obstacles to the cooperative solution of 4 key objectives
  - Retention of last copies
  - Ensuring back-up to online access
  - Expanding coverage, reducing duplication
  - Shared access to low-use collections
- Collections and Access managers from 34 research institutions in North America, the UK and Ireland
- Outcomes: recommended strategies at the local, group, and network levels; concrete next steps and “assignments”
“Shared access to low-use collections”

<table>
<thead>
<tr>
<th>Approaches</th>
<th>Obstacles</th>
<th>Measures of Success</th>
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<tbody>
<tr>
<td>Physical consolidation</td>
<td>Loss of ownership</td>
<td><strong>Collections</strong></td>
</tr>
<tr>
<td>‘Virtual’ consolidation</td>
<td>Loss of browsing</td>
<td>- increased coverage, reduced cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Access</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- direct, unmediated delivery</td>
</tr>
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**Strategies**
- fully disclose local and group storage collections and services
- implement single-copy policies to de-duplicate at ingest
- monitor system-wide usage to establish optimal overlap

**Solutions**

<table>
<thead>
<tr>
<th>Local</th>
<th>Group</th>
<th>Global / Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>policies</td>
<td>coordination</td>
<td>registries</td>
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**Measures of Success**

- Collections
- Access