

# SHARES Meeting:

## The Morning Session

Yale University  
17 October 2008  
New Haven, CT

# SHARES Since August 1, 2007

- Who's out?
  - Fashion Institute
  - Harvard U Law School
  - New York State
  - U of Michigan Medical
  - U of Nottingham
  - U of Southampton
  - Winterthur Museum
  - National Library of New Zealand
  - USC Law School
- Who's in?
  - King's College London
  - U of Arizona
  - U of Miami
  - U of Texas at Austin
  - U of Toronto Engineering and Computer Science
  - U of Toronto OISE
  - U of Toronto Gerstein
  - National Library of New Zealand
  - USC Law School

# SHARES Filled Transaction Volume

- 2006
  - 79,741 transactions at \$10
  - 906 transactions at \$30
- 2007
  - 65,589 transactions at \$10
  - 785 transactions at \$30
- 2008
  - 66,650 transactions at \$10
  - 931 at \$30

# Two months of SHARES IFM data to compare

- A couple of August's
  - 2007
    - 3,286 at \$10
    - 36 at \$30
  - 2008
    - 4,700 at \$10
      - +43%
    - 87 at \$30
      - +142%
- A couple of September's
  - 2007
    - 4668 at \$10
    - 48 at \$30
  - 2008
    - 6,392 at \$10
      - +37%
    - 87 at \$30
      - +81%

# SHARES “Reasons for No”

- Aug08 Biggest Lender
    - 620 unfilled requests
    - 53 partner symbols
    - 14 reasons-for-no used
  - Lacking 27%
  - In use/on loan 25%
  - Not on shelf 12%
  - Non-circ 9%
  - Auto-deflect (format) 5%
- Aug08 Biggest Borrower
    - 755 unfilled requests
    - 64 partner symbols
    - 24 reasons-for-no used
  - Lacking 23%
  - In use/on loan 21%
  - Non-circ 12%
  - Aged to next lender 8%
  - Not on shelf 8%

# “Reasons-for-No” Survey

- 20 survey responses
- Each reason given weight based on pecking order - 5 for first, 4 for second, etc. through fifth
- Counted lender and borrower responses in the same way, lumped the results together
- Some answered only as lender

# Your “Reasons-for-No”

- Non- circ 122
- Lacking 108
- In use/on loan 83
- Not on shelf 48
- Do not own 28
- Aged to next lender 20
- Missing 13
- Other 11
- Unspecified 10
- Deflected 8
- Holdings end before 8
- In process 6
- Poor condition 5
- Not found as cited 4
- Policy problem 3
- Borrower refused condition 3
- License restriction 3
- Conditional 3

# Your comments:

- Not enough holdings information in WC.
- People don't check the holdings information that is available.
- Some use conditional for "no."
- Many forced to use conditional because there is no other response with a text box. Would like to be able to send a Message in WCRS and ILLiad.
- SHARES partners go out of their way to provide details and workarounds rather than unfilling a request.
- Surprised and concerned about Aged to Next Lender and Unspecified.
- Most SHARES partners still won't lend media.



# Your comments, cont.

- Too busy to handle requests to borrow special collections unless library calls and asks for special permission to borrow; dealing with curators too much of a time sink.
- SHARES libraries are not following the spirit of lending materials not generally lent - such as getting a “not on shelf” the first day with no second search of stacks.
- Low SHARES fill rate probably due to the degree of difficulty of the requests - older, special materials commonly what we’re asking for.
- “Other” without an explanation is useless.
- Aged to next lender usually LC-related.

# Issues Touched Upon by this Investigation

- What do our reasons-for-no say about our technical environment? Our collaborative environment?
- How can we improve our use of reasons-for-no to provide better service and more information to borrowers?
- Is reasons-for-no information useful for strategic planning and ILL management?
- What are the most important statistics that you compile and consult?
- What statistics would you like to have that you don't have now?

# Methods for Improving WC Holdings Information

- Ongoing batchloads. Cost (aside from nominal setup fee) included in subscription price.
- Free “cancel holdings” projects. Libraries send MARC records or OCLC numbers as they weed items so records can be removed from WC. Can be simple text files in Notepad, fed into Connexion client. Some libraries handle as joint project among cataloging, circ and ILL.
- Reclamation project. Library sends whole collection to OCLC for reloading. Free, but holdings must be updated regularly afterwards.
- New wrinkle: to take advantage of emerging products and services, must have OCLC number linked with local control number in ILS. OCLC can provide this match.

## SHARES Executive Group: Finishing 2-year terms

- Susan Currie, Binghamton University
- Michelle Foss, University of Florida
- Jesse Koennecke, Cornell University
- Marjory Lobban, University of Edinburgh
- Merle Slyhoff, University of Pennsylvania Law

## SHARES Executive Group: Continuing 2-year terms

- Karen Bucky, Clark Art Institute
  - Sue Hallgren, University of Minnesota
  - Penelope Myers, Temple University
  - Susan Stone, University of Toronto
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- Will need four new nominees, including someone from a law library and someone from a non- North American institution.

# 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
  - Explore green shipping practices

# Actual SEG Work for 2008

- Rethink Pricing structure
- Explore Green Shipping
  
- Four new working groups:
  - High-performing lenders
  - Rethink onsite access
  - SHARES documentation
  - What's not being filled
  
- Sharing expertise
  - Needs an additional person

# What about SEG work for 2009?



# SHARES Documentation Working Group: Topics for listserv discussion

- Consider all requests
- Packaging
- No blanket use restrictions
- E-delivery
- No blanket restrictions by class of material
- Turn around time
- Policies Directory entries
- Trouble-shooting SHARES
- Net lending in's and out's
- EMST in SHARES
- Green practices
- Audience for specific pieces of SHARES documentation
- Level of granularity of guidelines and procedures
- Loan periods
- Lenders of last resort
- Dummy requests
- SHARES liaisons
- Renewals