

**Value of Resource Sharing luncheon, 3rd edition**  
**Friday, June 23, 2017, 1:00-2:30pm**  
**Hilton Chicago, Conference Room 4M**

**Participating:**

Peter Collins, University of Pennsylvania; Tom Delaney, University of Colorado at Boulder; Krista Higham, Millersville University; Zack Lane, Columbia University; David Larsen, University of Chicago; Kurt Munson, Northwestern University; Mark Paris, Brandeis University; Ken Peterson, Harvard University; Mike Paxton, University of Chicago; Alison Wohlers, California Digital Library; Dennis Massie, OCLC Research.



**Summary**

The two biggest themes of this session turned out to be:

- We need to push for smart systems that interoperate, simplify things for the patron, and, in conjunction with smart policies and partnerships, provide predictability and stability for both patrons and staff.
- We need to understand our patrons -- what they value, specifically, about the services we provide; what we're not doing that they wish we were doing; and what the consequences are when they can't get the research materials they need. We also need to tell their stories in a compelling way -- which will demonstrate the value of resource sharing better than anything else.

### **Top takeaways under the “smart systems” theme:**

Peter suggested providing some of the same perks and features that customers get from businesses -- an idea of when their order will be delivered, a monthly statement, recommendations based on past activity.

Kurt mentioned a new document being drafted by a BTAA committee of which he's part, the BTAA Discovery to Delivery Action Committee, describing an ideal next generation resource sharing system that would make the patron experience more Amazon-like. (**Update: the document, *Next Generation Resource Delivery: Management System and UX Functional Requirements*, is now [available](#).**)

There was some debate about the value of the Get It Now button, with David and Kurt advocating and Ken not so sure. (Kurt also advocated for a “Where’s My Stuff?” button.)

Ken said, “We have a “get it” service but it means nothing to our users. We need a system that doesn’t need explanation and the get it button would be just a request like any other. Plenty of online retailers make ordering easier than we do in the library landscape....”

Ken asked, “When does the line blur between discovery and fulfillment?”

David insisted that discovery should be unbundled from fulfillment.

Peter: OCLC is just the platform, the aggregation of library holdings. Similar to how Google search is just the entry point to get to where you want to go. Other companies, particularly IDS and previously Atlas Sys. built on top of the OCLC platform to provide high value services and features. How much do we want to rely on OCLC to do this (the iPhone model) and how much do we want to rely on the community of users and vendors (the Android model)?

Zack: How can we help OCLC do what it does best to help IDS and Rapid do what they do?

### **Top takeaways under the “understanding patrons” theme:**

Kurt said we’re not asking the right questions, of the right people. Find out what grad students value, and why.

Peter said that now we only communicate with users in the negative (“return the book”, “pay a fine”, etc.). Our communication should be proactive and demonstrate the value of the library.

Mark is interested in exploring how collection sharing interacts with the process of collection development. He described a study they’ve done at Brandeis, studying the availability of items listed in bibliographies of articles by their faculty to see how many of those items are owned by

Brandeis and how many they could have gotten on ILL. Now they are interviewing faculty and learning a number of things, like the fact that they use the most accessible items versus the best, and that they often go to peers for material before trying ILL.

Ken said that we need to not be myopic in our analysis of data. Our users are moving around as much as we are moving materials (maybe more!) Let's understand why and then how we can deliver services from our home locations in the best possible way to support them.

Ken also said that librarians are hung up on privacy issues to the detriment of service to patrons. For instance, we delete their borrowing histories for privacy reasons. It's up to them to track what they've requested.

We agreed that maybe an in-depth ILL user study is something we'd like to try, leverage the group's collection-sharing expertise and patron populations with OCLC Research's capacity for conducting such studies.

**Extremely Rough Notes -- please flesh out your parts, if you are so inclined!**

Zack: Costs study. Library in-depth project -- library school intern. Costs for sharing, not storing. Tolerant of costs before. Minimize costs -- offsite. Complicated system, complex user behavior. Paul Courant, ReCap vs Butler. Cost of retrieval from ReCap.

Krista: shipping up to 30 pounds per box. IDS of PA -- State of PA subsidizes shipping costs.

Zack: Predictability. Well known costs.

Kurt: Not asking the right things. Or the right people. Levels, different needs. Start with grad student history. What do sources mean? And how do they advance research? If not able to get, what do they do?

David: Compelling.

Kurt: Smaller sample necessary. (?)

David: Big Ten -- Ivy Plus. 80% rotating off UBorrow. (?)

Zack: Launch shared collection. Don't tell each other loss rate. It's low. Knowing data and context of services, not imagining loss as a threat.

Mike: Who are you trying to talk to?

Ken: CRL, access lagging behind their work? Access is pivotal to their work? Pressure to maintain level of service.

Mark: How does resource sharing interact with the process of collection development. East. Comments, BD of resource sharing. (?) 18K citations. 2016. Policies not helpful for resource sharing. Citation based on reading the abstract. (?)

Kurt: Resource sharing is expensive. Not equal value. It's that one table, not the whole article. Abstract is often all you need -- if it's a full, rich abstract.

Ken: Outside data. Brandeis faculty to come to Harvard. Regional. (?)

**KJP- I think my point was that we need to not be myopic in our analysis of data. Our users are moving around as much as we are moving materials (maybe more!) Let's**

**understand why and then how we can deliver services from our home locations in the best possible way to support them.**

David/Kurt: Faculty network. When do they come to us (in ILL)?

Peter: How do we communicate to our users? Reposition fulfillment streams. If Amazon, you have some idea of when it will be delivered. If BD, SHARES, Rapid or other, how long? Important for articles. Do we have a way of having a little clock -- if Rapid, knowing it is 2 hrs.

Peter: My eyes around plus items. Only time we're worry to users. Due, his back. (?)

**PDC- I think this goes along with the info directly below. Except what I was trying to say is that now we only communicate with users in the negative ("return the book", "pay a fine", etc.). Our communication should be proactive and demonstrate the value of the library.**

Peter: Commerce, more. Monthly statement, other services I'm eligible for. Subject specialist, on email receipt. Could be same with BD. More ways of embedding communication with user. Engage with us. Doesn't get to who is not using us. Or 1-time users. Smart way to communicate on a monthly basis -- statement. Positive experience.

Kurt: Functional requirements (new doc) based on what was done before. BTAA, Amazon Experience. "Where's my stuff" button.

Peter: Make it not creepy!

Kurt: Helpful to have data. They track, we track, useful to users. All in circ -- but then, poof, it's gone. We force patrons to manage their histories externally.

Ken: Won't leap to non-space, non-physical. (?) Physical (sharing?) is decreasing. What other mechanisms do we need to embed ourselves? Get over privacy. Discovery, better (than?) open URL. Think further out. Metrics and assessment not based in book inventory.

Krista: Can we buy our way out of shipping physical books? Consortial purchase of ebooks.

Tom: Dir out & support (?) will be metrics and analysts.

Tom: (or Dennis? Or both Tom and Dennis?) One concern: move to closed world, those who can't buy or borrow. Have's and have-not's. Borrowing licensed ebooks in its infancy. Concerning from academic point of view. Start thinking.

Ken: Harvard - how many copies - no face to trigger to best practice. (?) Evaluation of what's being used to retain. Every meeting - how many copies? Collective collection.

Zack: How many copies in Borrow Direct? How many copies in WorldCat? Not hard to know.

Kurt: All they BD & OCLC identify (?) things - large number dedupe it. Does anyone care if we keep? Usually no.

Ken: 31K records for X number. Amy Wood report.

**KJP- The CRL Print Archive Network meeting notes probably describe this better than I could...**

Peter: Threads.

Kurt: Commonality - size of institution -- address some issues.

Krista: Mid-sized, I'm the odd man out. Not a lot of unique stuff, no offsite storage.

Tom: Inst. (?) Labor intensive. Make transparent to user AND staff.

Mike: Local catalog, lost item.

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Ken: API to local catalog. Middle space where we leverage actual record.

Kurt: Will lend to me -- is it available?

Krista: If lender grayed out in ILL, why not in WorldCat?

Tom: Smart system; will you lend from this collection?

Zack: Massive transformation, big data. IDS, Rapid is where real innovation in ILL infrastructure is happening.

Peter: Is asking what is OCLC doing like asking what Google is doing? Should OCLC be doing this stuff like IDS and Rapid?

**PDC- The point I was trying to make is that OCLC is just the platform, the aggregation of library holdings. Similar to how Google search is just the entry point to get to where you want to go. Other companies, particularly IDS and previously Atlas Sys. built on top of the OCLC platform to provide high value services and features. How much do we want to rely on OCLC to do this (the iPhone model) and how much do we want to rely on the community of users and vendors (the Android model)?**

Zack: How can we help OCLC do what it does best to help IDS and Rapid do what they do.

Tom: Cost is the value. Seamless is what we want for patron.

David: Get it button. Would love to see OCLC Get It button. "Was really important to know Columbia." "Faculty told us stuff they believed was wrong." Used info to know whether to go to places physically.

Tom: More value?

David: What interface work will (?) with what you do? We value free, quick, or efficiencies. What do patrons value? Some want things no matter what.

Tom: Prof X, who asks, "How soon will I get it?"

Zack: Having our first Get It Now conversations at Columbia. Need to control user behavior to get where we want to go (actually I wrote "know"). Neither is where we want to be.

Tom: Things work best in a black box. They don't need to know.

David: Not true i every case. Patron: "Last 4 books came from Michigan." (Maybe patron would want to go there if the patron knew?)

Ken: Hate Get It Button. Don't have it at Harvard. (Systems Design a possible path for our focus? -- did Ken say this? Seems to be a separate note.) Doesn't exist. (?)

**KJP- We have a "get it" service but it means nothing to our users. We need a system that doesn't need explanation and the get it button would be just a request like any other. Plenty of online retailers make ordering easier then we do in the library landscape....**

David: Useful work, Get It button. At what point make a request? How find? What context should Get It Button be in?

Mike: Amazon. 1 Button, 1 click away from deep dive.

Kurt: I want thing, get it. Other things going on. Complex situation.

Ken: When does line blur between discovery and fulfillment?

David: Fulfillment shouldn't force a discover method.

Mark: Purchase option.

Zack: Machine log does one thing out of all the things people do.

Tom: System to system more interactive?

Zack: Have to take into account human element?

Kurt: Close to 1 button. Semi manual process, little choice. If they choose, they can do stuff. Individuals can choose all kinds of things.

## Background distributed before the session:

### Prospective “Value of Resource Sharing” discussion topics: Round III

- We demonstrate value best by documenting the value we deliver to our patrons.
  - David: One could fruitfully explore how what patrons value (speed, convenience, efficiency, ease) determines whether resource sharing is ultimately perceived as valuable.
  - Micquel: Rather than focusing on systems and exploring the lifecycle of the request, we should look at that of the learner.
  - Emily B: We need to support our value not just with numbers, which are important, but with human examples of how we make a difference with researchers.
  - Matthew: We are now sharing this [citation study] work with our faculty and learning a lot, such as their choice not to use the best, but most accessible material.
  - Megan: Did they value what we provided, and why?
  - Peter: We know that resource sharing supports research, course completion, and publishing, but it this is usually a one-way street: we provide information on demand but don't see the final result, the contribution of that material to the final product.
  - David: We need to collect and tell the stories of how the material we obtain for our users transforms their studies or allows them to succeed as researchers.
  - Kurt: I think we need to explore how we can make the process smoother for both the patrons and library staff. We talk about the cost of resource sharing a lot but we haven't really talked about how it could be easier or how policies get in the way or how our processes are so costly because they make so much busy work.
  
- One method of measuring value is to determine how much a library service would cost if the patron had to buy that service from a commercial provider.
  - Bill: How much did you spend on textbooks? None! ILL!
  - Emily B: Academic databases are not available to alums. It would be too expensive to provide continued access after they graduate. Why not measure that expense?
  - Zack: Build an equation to calculate the costs of various forms of access: shelf/retrieve on campus, shelf/retrieve remotely, etc.
  - Krista: Consortial purchasing is cheaper than shipping a \$4 ILL package.
  
- Collections used to be a way for libraries to demonstrate value – by counting them and bragging about their size. Now numbers of volumes to which you have access via consortia is a more useful metric. And collections can have different values for an

organization depending upon where they are housed, how quickly they can be provided to users, and who wants access to them.

- Zack: How can access to legacy print in HD storage (ReCap) be monetized? Change mindset to lower costs for institutions committed to perpetual preservation & access; raise costs for institutions that do not.
  - Emily S: Paul Courant did a study of what it cost to keep a book on the shelf on campus as opposed to in offsite storage. Cost modeling raises question – and we can provide more efficient access from offsite storage. Are the numbers in the Courant study still right?
  - Matthew: What would be the cost to retain a last copy in a secure climate controlled environment? Would we then be counting on ARLs to do the work of preserving our cultural heritage? We already know there are unique material not held by ARLs so how do the pieces fit together? How do we incorporate public libraries which also have many unique materials in their collections? How do we equitable share the resources and costs?
  - Peter: We rely on redundancy. 65% of Harvard requests are for thing they already own. BorrowDirect requests are a mix of unique holdings and high demand items.
  - Peter: Floating collection? How would we manage? We could use existing BorrowDirect infrastructure, which creates temporary circulation records at the borrowing library... Instead of a hub-and-spoke network, we would have a web.
- We can demonstrate value by providing new services to patrons that make their experience more like Amazoogole.
    - Peter: How do we create delivery predictability models like everyone in ecommerce already offers? Are we just afraid to predict because we don't want to be wrong? Or do we really not know enough to offer delivery information to users?
    - Micquel: I'm interested in focusing on the learning moments available throughout the resource sharing workflows and integrating stronger information literacy into the users' experience. I like the idea of predictability, but that assumes the user fully understands the process of which resources are playing in their research/learning...I wonder if there is a way to tie some of these ideas together?...“Micquel has begun processing your request for a dissertation – while she is hard at work, did you know your library provides access to these peer reviewed journal articles that you might find helpful?” or even “You can expect this article to hit your inbox within 24 hours – are you ready to evaluate and cite it? You might find these research guides helpful...”