Resource Sharing Committee Board Report
April 2011

Committee Membership:

| Matthew Shaw, Ball State University, Chair, RSC | Collette Mak, Notre Dame University, Secretary, RSC |
| Arthur Hafner, Ball State University, Board Liaison; ALI President | Elaine Nelson, Ball State University |
| Tina Baich, IUPUI | Holli Moseman, Indiana State University |
| Rita Rogers, Indiana University | Brad Matthies, Butler University |
| Judy Tribble, Saint Mary-of-the-Woods College, ALI Board of Directors |

Resource Sharing Committee: Discovery to Delivery; Fundamentals and Frontiers
Hosted by Cunningham Memorial Library, Indiana State University (Terre Haute)
Friday, March 11, 2011

Presentation Highlights:

**Union Catalog/Remote Circulation Case Study**
(Presenters: Randy Dykhuis and Debbie Schaubman, Midwest Collaborative for Library Services)

- Presented information on the development and function of MeLCat, Michigan’s union catalog.
- Discussed remote circulation service built on MeLCat.
- Encouraged further investigation of a similar endeavor in Indiana.

**Updates from the Indiana State Library**
(Presenter: Jim Corridan, Deputy Director of the Indiana State Library)

- Discussed resource-sharing capabilities of the Evergreen system.
- Announced renegotiation of statewide delivery system contract with expected price increases.
- Accepted questions and comments about difficulties with INFOExpress.

**Updates from OCLC**
(Tony Melvyn, OCLC)
Discussed WorldCat Knowledge Base, which accesses local e-resources holdings and provides resource-sharing staff with a direct link to e-content. OCLC will provide standard licensing information to participants.

Introduced information about the introduction of the OCLC Reciprocity Calculator, which will allow participants to create reports of borrowing and lending activity with chosen libraries, allowing opportunities to create data-driven reciprocal agreements with lending institutions.

**SAMPLE TAKEAWAYS FROM EVALUATIONS:**

- Work toward direct request.
- Talk to system librarian about OCLC knowledge base.
- . . . better use of our ILL OCLC services.
- Implement WorldCat Knowledge Base.

*Saving Time and Money in Interlibrary Loan*
(Presenter: Holli Moseman, Indiana State University)

- Time-saving measures including: increased loan period; no renewals; revised custom holdings to reduce request to delivery turnaround time; revised statistical reporting.
- Cost-cutting measures including increased reciprocal borrowing agreements with other libraries; improved billing accuracy to avoid costly mistakes.

**SAMPLE TAKEAWAYS FROM EVALUATIONS:**

- Edit my custom holdings in OCLC.
- Look into LVIS. Feel comfortable in taking the plunge in reciprocal lending agreements.
- Do custom holdings in First Search.

*The Advantages of RapidILL*
(Presenter: Kenneth Kinslow, University of Notre Dame)

- Discussed document delivery cost savings and reduced request to delivery time.
- Demonstrated “pod” model.
• I am going back to my library to discuss RapidILL.

*Opening Up to Open Access: using open access materials to fill borrowing requests*
(Presenter: Tina Baich, IUPUI)

- Demonstrated several open access sources and shared search strategies.
- Shared sample notification email for open access filleds.

**SAMPLE TAKEAWAYS FROM EVALUATIONS:**
- Use more open access.
- Look for free resources for filling ILLS with open access tools.
- Utilize open access with a game plan!

*Evergreen Indiana and the Impact of Patron-Initiated Resource Sharing*
(Presenter: Jim Corridan)

- Provided information on the State Library’s growing open source ILS initiative, which presently includes over 90 school, public, and institutional libraries in Indiana.
- Demonstrated how the Evergreen catalog provides access to over 3.5 million bibliographic records and over 5.5 million items.

**SAMPLE TAKEAWAYS FROM EVALUATIONS:**
- Think about Evergreen possibilities.

**NOTE:** Conference expenditures came in below budget.

### ALL Resource Sharing Conference Summary Statistics

**Morning Session**  
**March 11, 2011**  
**Scale: 5=High, 1=Low**

<table>
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<th>Question</th>
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<td>62</td>
<td>4.5</td>
<td>5.0</td>
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**Survey Question:** When I return to my institution, I will be able to
Comments by Persons (survey no. in parentheses) from Academic Libraries
02. Tell our students about the Evergreen System.
03. Glad code was passed in time.
05. Not sure, need to look through notes :). I'm fairly new -still learning- actually understood many things discussed :).
06. Will look at additional work flow to see if we can save additional time in our office.
08. Use more open access. Work toward direct request.
09. Share info from the state library and OCLC.
11. Talk to system librarian about OCLC knowledge base.
13. Edit my custom holdings in OCLC. Look for free resources for filling ILLS w open access tools.
15. Begin to review workflow and money-saving practices.
16. Utilize open access with a game plan!
17. *Suggest some practical steps for ILL operations. *Think about evergreen possibilities. * Heard about very current OCLC developments?
19. Look into LVIS. Share OCLC news. Feel comfortable in taking the plunge in reciprocal lending agreements.
20. Better understand workings of how IN ILL works, better use our ILL OCLC services
22. Use more search techniques.
23. Do a better job!
24. Speak about upcoming OCLC changes. Look into making our ILL more efficient.
29. Updated/check my custom holdings deflection updates.
30. Implement WorldCat Knowledge Base
31. Find more items online
32. Reevaluate how we do ILL.
33. Re-think some of our ILL policies/introduce KB
37. Add new contacts to network of library staff/librarians for information sharing. Share with my local team and explore possibilities for us to improve resource sharing at my institution (OCLC, KB, time/cost saving tips, ISU, etc.)
38. Consider the cost effectiveness of resource sharing in Indiana libraries, including my own.
45. Have quite a bit of information to consider for our work flow. Appreciate practical "how to" approach.
46. Use some of the updates and new info that has been presented to evaluate my library's ILL operations and workflow.
47. Use some of the techniques to streamline ILL office and streamline research for finding more illusive requests.
48. Be better informed about developments in IN resource sharing. Update policies and procedures to increase efficiency and effectiveness of ILL.
49. Work with OCLC KB. Evaluate our procedures and policies. Update custom holdings.
51. Use WorldCat Knowledge Base. Wasn't aware of it being free to our institution.
52. Apply the clever tricks presented to improve workflow.
53. Implement or discuss what I learned with my library.
56. Work on custom holdings and WorldCat
57. Do custom holdings in First Search.
62. Take a critical look at my Interlibrary Loan process.
63. Do OCLC knowledge bases + license management

Comments by Persons (survey no. in parentheses) from Public Libraries
07. Ask many questions about LVIS and OCLC. We do not update our catalog with OCLC as it costs money. I'm not sure why we have access to ILLiad or Odyssey - I will have many questions when I return to work.
25. Talk to my department head about some ideas for improving services to patrons and efficiency of tasks for interlibrary loans.
27. Implement some of the information.
43. Update Director- Info Express, IFM, stats. Update custom holding. Change lending from 3-day, 1 renewal to 60 days, no renewal. Cut paper storage in half.
44. Better explain the relationship between the various ILL communities. I also now know how the Indiana State Library helps to direct ILL procedures and practices. Really learned a lot through the open-access presentation.
54. Save time and money. ILL update info OCLC.
59. Above my head but should be
61. Discuss MeLCat. OCLC updates. Good discussion about ISL delivery updates.

Comments by Persons (survey no. in parentheses) from Academic Libraries (K-12)
34. Make better use of OCLC

Comments by Persons (survey no. in parentheses) from Other: Special
36. Understand MeLCat

Afternoon Session I¹
March 11, 2011
Scale: 5=High, 1=Low

Session I Morning
Topic: Saving Time and Money in Interlibrary Loan

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<th>Question</th>
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<td>Goals, expectations communicated</td>
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<td>57 4.3 4.0</td>
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<tr>
<td>I learned something useful</td>
<td>44 4.2 4.0</td>
<td>13 4.4 5.0</td>
<td>57 4.2 4.0</td>
</tr>
<tr>
<td>I thought session was interesting</td>
<td>44 4.2 4.0</td>
<td>13 4.4 5.0</td>
<td>57 4.0 4.0</td>
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Comments on Session I (survey no. in parentheses) from Academic Library Participants

Session Topic: Saving Time and Money in Interlibrary Loan
01. Had to miss. Conflicted with previously scheduled meeting across campus.
02. We do a very small volume of ILL, so much of this didn't apply - No ILLiad, etc.
03. Great!
08. A bit obnoxious
10. Great ideas! Thanks!
11. Conceptually interesting given the economic landscape but didn't learn much applicable information for my institution.
12. The sample reciprocal agreement contract was very beneficial! Holli was a very engaging and energetic speaker.
13. Very helpful- we are starting out ILL and the discussion about the custom holding and reciprocal agreements was helpful.
22. Bravo Holli!
23. Holli was entertaining. Useful info to quickly implement.

¹ Note: Academic library participants attended the topic “Saving Time and Money in Interlibrary Loan” and public library participants attended the topic “The Advantages of RapidILL.”
24. Very good session. I am new to this so a lot is really new. Thanks for the good info.
26. Very useful information I can probably use at my own library.
32. Speaker was too arrogant. It’s ok to state your opinion but not for everyone. Constantly stated she hates something in regards to ILLiad when someone asked a question. RUDE.
39. She took too many liberties - speaking for others- "Everyone hates Ariel." Was a bit too arrogant.
47. Much of the information was geared more towards the academics libraries. Still, I would have some new information and possibly talk them into updating our account with OCLIC
48. Most info was not applicable to my library's situation.
49. Very helpful and practical.
50. Very well prepared
57. Very good use of slides. Presenter was easy to listen to and ask questions of. Great topics. Good tips.

Session I Morning
Topic: The Advantages of RapidILL

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Comments on Session I (survey no. in parentheses) from Public Library Participant.
Topic: The Advantages of RapidILL
07. We need ALI pod
18. Thanks for explaining in simply yet informative session.
25. Answered all my questions about Rapid
42. I am going back to my library to discuss RapidILL.
43. Quite practical and even entertaining.
55. A+
61. A tutorial in ILL well organized.

Afternoon Session II
March 11, 2011
Scale: 5=High, 1=Low

Session II Afternoon
Topic: Evergreen Indiana

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<td>4.0</td>
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</table>
I thought session was interesting  

5  4.4  5.0  
4  4.8  4.0  
9  4.6  5.0

**Comments on Session II (survey no. in parentheses) from Academic Library Participants**

**Topic: Evergreen Indiana**

02. I went just out of curiosity, but it turned out to be very relevant info to pass along to our students.

20. Too much clicking - very specific to large academic institutions

**Comments on Session II (survey no. in parentheses) from Public Library Participants**

**Topic: Evergreen Indiana**

35. Thank you!

**Session II Afternoon**

**Topic: Opening Up to Open Access**

**Note: 10 participants did not identify which Session II program they attended. Their responses are not included in this tally.**

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**Comments on Session II (survey no. in parentheses) from Academic Library Participants**

**Topic: Opening Up to Open Access**

04. Lots of useful info.

05. Glad you could show actual links, very helpful.

08. Extremely helpful - especially integrating ILLiad content.

12. Helpful

15. Gave me ideas to take back and see if we can incorporate these tools to save money. We do use serial solutions - I'll see if we are using it to the max.

16. More avenues/shortcuts for non-ILLiad users/ Thank you for providing a list of websites!

17. Some impressive statistics on Evergreen, an impressive project ALI-libraries- what should we learn from Evergreen Indiana?

22. Helpful searching tips.

38. A combination PowerPoint/online demo with smooth flow, for open Access would be easier to present, including handouts or a slide package.


45. Not as east to follow. Problems with slow connections did not help - been there- a little more explanation would have helped in some of the steps. Thank you!

46. Great info – haven’t heard of many of them before.

53. Tina did a fantastic job. I learned something new.

**Comments on Session II (survey no. in parentheses) from Public Library Participants**

**Topic: Opening Up to Open Access**
25. It was very helpful that Tina demonstrated actual internet connections and processes. Practical and clear explanations.
27. Was interesting to know but isn’t something I would use.
61. Sort of boring speaker. Needed to be more engaging. Not enough passion. Pretty heavy info for afternoon session.
The Committee conducted a debriefing following the Discovery to Delivery: Fundamentals and Frontiers Conference held on March 11, 2011 at Indiana State University.

Members made the following observation about elements of the conference planning and preparation:

- **Library Education Units (LEUs)**—Our application for LEUs should have been submitted earlier in the process. We were fortunate that the Indiana State Library considered the application and granted the LEUs so quickly. We need to allow more time for the application process in the future.

- **Call for Proposals**—We should open the Call for Proposals for a 60-day period for future conferences. The timeline was very compressed.

- **Conference Announcements**—The date for future conferences should be set earlier, so we can begin “hold the date” announcements at least 6 months in advance with a registration cutoff substantially earlier than the conference date.

- **Time/Location**—We were glad to have good weather, but can we count on this in future years? The coincidence with Indiana State University’s Spring Break was fortuitous, especially for parking. The schedule (9 AM – 3.30 PM) seemed to work quite well with only a few attendees leaving at approximately 3 PM.

- **Free Registration, Parking, Food**—This is something we’d like to repeat at future conferences to continue to attract attendees, who may not have extensive travel budgets.

- **Catering**—We ran short on chips and some attendees suggested soft drinks would have been nice.

- **Recording Sessions**—We would like to capture and disseminate video of sessions at future conferences. A waiver will need to be signed by presenters.

Committee members agreed that the conference should be held bi-annually.

Prepared by Matthew Shaw
Approved: March 25, 2011