Background: Barbara Maxwell, our State Librarian, would like to see WorldCat available statewide, and to establish an Indiana ‘view’ of WorldCat to deliver an Indiana union catalog. INCOLSA is writing an LSTA grant to fund the first year. This is a very specific grant, covering little more than a one-year license for WorldCat and an Indiana view through OCLC Group Services; the money must be spent by September 30th. Most of the implementation costs will be incurred after September; INCOLSA is contributing those implementation costs.

Ongoing costs for WorldCat and the Indiana statewide catalog will be built into an FY2006 INSPIRE grant. INCOLSA is committed to the Indiana statewide catalog and to ongoing statewide access to WorldCat. We see this as an essential service for Indiana libraries in a googleized information age and to position libraries for more active and equitable participation in resource sharing.

Phase One: Introduction of WorldCat through INSPIRE

What does the initial grant cover?
The initial grant covers a one-year statewide license for WorldCat and an Indiana-specific view of WorldCat.

When will the grant be approved?
The grant is due to the state library on May 30th and will be presented to the ILHB for approval in June. INCOLSA expects to have access to the funds soon thereafter, perhaps in July.

Why is WorldCat being added to INSPIRE?
In order to provide access to all Indiana residents WorldCat must be accessible through INSPIRE. This allows us to take advantage of INSPIRE’s authentication and INSPIRE’s name recognition. WorldCat will also be available through individual library FirstSearch accounts and as a Z39.50 target.

What is the timeline?
WorldCat available through INSPIRE should be available to Indiana mid-August—in time for the start of the fall term.

The Indiana state catalog will take approximately 6 months to create. That includes time for the WorldCat Taskforce, appointed by the INSPIRE committee, to define the various views and for OCLC to build our catalog. We are targeting late 2005/early 2006 for the state catalog.

The catalog will be introduced with the holdings already in WorldCat and will grow as libraries add their records to WorldCat through cataloging and batch loading.

What does a one-year license accomplish?
Neither INCOLSA nor the Indiana State Library view this as a one-year project. We are committed to ongoing support for the Indiana state catalog and WorldCat for the state.

Starting the project now, with the first year funding, allows us to provide unlimited WorldCat in time for the start of the fall term. It also gives us a vehicle for introducing the benefits of contribution to WorldCat to non-participants and begin to grow our catalog. Those informational efforts are starting now with a series of update/information sessions around the state called “What in the World(Cat)?”.

Do I need to continue my current subscription to FirstSearch WorldCat?
No. Our license with OCLC provides each library with its own account; if you have WorldCat through FirstSearch you can continue to use that account (no need to configure a new account).

What happens to my subscription?
If your subscription is set to renew before Indiana’s WorldCat goes live, OCLC will work with us to extend your current subscription to fill the gap between the end of your subscription and the start of Indiana’s license so you have no interruption of service.

If your subscription overlaps Indiana WorldCat your subscription can be prorated and the “extra” kept on credit to apply to your OCLC bill for other products and services such as cataloging or resource sharing.

How will libraries be trained?
INCOLSA will provide training both on use of FirstSearch and on the FirstSearch administrative module so libraries can take advantage of advanced features such as interaction with serials resolvers, links to OPACS and the ILL link.
Phase Two: Introduction of Indiana statewide catalog

What is the Indiana statewide catalog?
The Indiana statewide catalog is a virtual catalog based on an Indiana-specific filter of WorldCat. The catalog will be introduced based on the then current holdings in WorldCat. This is approximately 7.9 million records and 24 million holdings. That includes over 500 thousand records unique to Indiana libraries (not held by any other WorldCat library) and 4.5 million items held by one only library in Indiana.

In order to support end-user discovery guiding users to their home collections, our catalog will include a number of subviews. These views will probably be based on factors such as geography or library type.

Who decides what views the Indiana statewide catalog will have?
The INSPIRE Committee is convening an ad hoc task force charged with deciding what subgroups our catalog will have.

Who is on the taskforce?
The task force is intended to represent all types of libraries and has representatives from many types of libraries. ALI will have three seats on the task force.

While the group hasn’t begun its work, it is safe to assume there will be an ALI subview. That view can be "private"—the ALI view can be added only to ALI member accounts.

What is the review process for "day one" subviews?
That review process will be part of the work of the WorldCat Taskforce.

Can the subviews be changed?
Yes. We will be evaluating the effectiveness of the various views and user satisfaction and adjusting the views based on end-user and library input. The WorldCat Taskforce will make recommendations on how/how often to adjust the subviews.

What are the levels of authentication?
There are three levels of authentication
1. **INSPIRE user.** The INSPIRE user is an anonymous user and has access only to the state catalog and all of WorldCat through the INSPIRE interface. Features such as ILL are not available to anonymous users.

2. **Library user.** The library user is associated with a specific library and has been authenticated to the library level through the home library’s process, e.g. IP range. The library user has access to whatever databases, resources and services the library has chosen to offer to its general public. For example, a library user might be able to click to e-books and search additional databases.

3. **Known user.** This is the highest level of authentication and identifies the user as an individual. FirstSearch supports NCIP for authentication. ILLiad libraries authenticate users for ILL through a variety of means including LDAP.

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**Phase Three: Grow Indiana holdings in WorldCat**

*How many libraries currently contribute holdings to WorldCat?*

200 INCOLSA libraries contribute cataloging to WorldCat. The Indiana statewide catalog provides a significant opportunity for more libraries to add their holdings. Participation in WorldCat also positions libraries to participate more fully in resource sharing.

*My holdings are incomplete—how do I get my holdings caught up?*

OCLC will give every library a no-charge, one-time batch load to help you start-up. There is no time limit on the one time waiver of OCLC batch loading costs. We strongly recommend that a library not batch load its holdings until it is prepared for ongoing maintenance of its holdings.

*We’ve cataloged multiple campuses on one symbol, how do we fix that?*

OCLC will give every library a no-charge, one-time symbol flip. We’ll want to work with you so that you’re ready for on-going cataloging that reflects all your identities. We strongly recommend that a library delay its symbol flip until its prepared to have ongoing cataloging that reflects the separate symbols.

*Does the batch load cover my serials holdings statements?*

Batch loading of serials statements is a separate load and requires that each record include the OCLC accession number. That service is on hold.
at OCLC, pending the move of union listing from the old platform to the Oracle database scheduled tentatively for late 2005. There has never been an ongoing charge for serials batch load; the one-time evaluation fee will be waived for new union listing libraries.

**Are libraries required to participate?**
No. There are no requirements for participating in the Indiana statewide catalog. Because the catalog is based on holdings in OCLC WorldCat it’s likely that more libraries will be interested in use of OCLC as a cataloging system but there are no requirements for them to do so in the grant.

**Phase Four: Establish policies for resource sharing**

**How does the Indiana statewide catalog position Indiana for resource sharing?**
The Indiana statewide catalog provides every library in the state with an efficient catalog aggregating the collections of over 200 Indiana collections. At introduction, the Indiana statewide catalog will include the 7.9 million records and 24 million holdings already in WorldCat. That’s a significant resource when 4.5 million of those records are held by only one Indiana library. The Indiana statewide catalog will grow as libraries contribute their ongoing cataloging.

Having a common resource for citation and holding verification builds on our existing infrastructure of current ILL libraries (whether through Docline, OCLC or paper forms), Wheels for delivery and INCOLSA’s e-ILL service to support libraries without other access to interlibrary loan.

**What is equitable resource sharing?**
What’s “fair” for load leveling depends on the state’s philosophy of service. For example, one philosophy might be that the more a library borrows the more it should expect to loan. Another philosophy might be to spread resource sharing by sending more requests to libraries with low levels of lending. One of the simplest and easiest ways to load level is to route requests to the smallest holding library. These, and other, models of load leveling are possible but depend on a statewide agreement on that philosophy of service.
Is there a state resource sharing code?

Does the grant require any changes to current resource sharing?
No. The Indiana statewide catalog is primarily an end-user discovery tool to help guide users to materials in their home libraries. An individual library may choose to turn on ILL but it is not a requirement.

Are libraries required to participate in resource sharing?
No. This grant addresses access to WorldCat and to the state holdings within WorldCat.