7-27-2017

Steering the Collection, Together: Growing Stronger Regional Collections with Resource Sharing Data

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Publication Information
Blackburn, Kourtney; Ross, Kate; and Mulligan, Michael, "Steering the Collection, Together: Growing Stronger Regional Collections with Resource Sharing Data" (2017). Lavery Library Faculty/Staff Publications. Paper 51.

https://fisherpub.sjfc.edu/library_pub/51

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Steering the Collection, Together: Growing Stronger Regional Collections with Resource Sharing Data

Abstract
This presentation will begin with a refresh of the initial stages of a multi-year project which aims to strengthen individual libraries' collections as well as regional collections through the use of resource sharing data. With rich resource sharing data (such as the number of times a title was requested within IDS Project, regional holdings, and more) staff in acquisitions and resource sharing can collaborate to build strong, diverse collections without even having to learn ILLiad. Our presentation will also elaborate on the second phase of this project, in which we have focused our work on real-time coordinated collection development, taking resource sharing data and actively moving ILLiad requests based on libraries' willingness to buy and send titles related to curricular strengths. We will share how we worked with developers to move ILLiad requests in real-time, planned physical and ILLiad workflows, and tested buying and shipping requested physical items to borrowing libraries using two common academic library vendors. We will also discuss our progress on including regional libraries outside of the IDS Project. Join us to find out how your library could participate. Let's work together to identify where the program could go next as we improve this program to best serve all of our patrons.

Disciplines
Library and Information Science

Comments

This conference proceeding is available at Fisher Digital Publications: https://fisherpub.sjfc.edu/library_pub/51
Steering the Collection, Together
Growing Stronger Regional Collections
with Resource Sharing Data

Kourtney Blackburn and Kate Ross, St. John Fisher College
Mike Mulligan, IDS Project (Project Developer)

This project is supported by Regional Bibliographic Databases and Interlibrary Resources Sharing Program Funds which are administered by the Rochester Regional Library Council.
CCD Project Development Timeline

- Fall 2015: First grant and API development
- Spring/Summer 2016: Testing API data gathering and communication functionality
- Fall 2016: Second grant and development, Charleston Fast Pitch Competition award
- Spring/Summer 2017: ILLiad workflows development and testing
The First Grant:

- Focused on asynchronous communication
- Created an API to allow communication between libraries through ILLiad/IDS data
  - Weekly reports
  - Web platform
- Make informed decisions about purchasing titles related to curricular foci, to make collections in region more user-focused
  - User-focused collections shared among all our patrons
If only we had the data available:

- 0 IDS Libraries owned
- Requested 4 times within NYS
- Matches Conspectus: MT

Took 8 days to borrow out of state...

...when a library down the road specializes in music.
<table>
<thead>
<tr>
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<th>TN</th>
<th>Title</th>
<th>ISBN</th>
<th>OCLC</th>
<th>Reqs Site</th>
<th>Reqs IDS</th>
<th>Consip Site</th>
<th>Consip IDS</th>
<th>Owned Site</th>
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<td>HQ</td>
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<td>PC,TK</td>
<td></td>
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<td>4</td>
</tr>
</tbody>
</table>
Web Reports: your institution’s data or partner data

IDS CCD Borrowing Report

<table>
<thead>
<tr>
<th>Site</th>
<th>TN</th>
<th>Title</th>
<th>ISBN</th>
<th>OCLC</th>
<th>Req Site</th>
<th>Req IDS</th>
<th>Owned Site</th>
<th>Owned IDS</th>
<th>Consp Site</th>
<th>Consp IDS</th>
<th>Rec Level</th>
</tr>
</thead>
</table>

Search:

Copy | CSV | Excel | PDF | Print
CCD Search

CCD Test
Home / Tests / CCD Test

CCD Test Enter an ISBN/OCLC

<table>
<thead>
<tr>
<th>CCD Test</th>
<th>ISBN</th>
<th>OCLC</th>
</tr>
</thead>
</table>

Search
CCD report outcomes

- Decreased duplication of efforts, funds, and materials within region
  - Sustainability and Fiscal Responsibility
- Increased diverse materials within region
  - Faster ILL
- Collaboration among library departments and among libraries
  - No ILLiad experience needed
Building on the Benefits: Real-time CCD

- Even quicker ILL turnaround times
- Further de-duplication of effort (more proactive, less reactive)
  - New, unique, relevant titles added to collection sooner
- Increased collaboration, camaraderie among libraries
  - Your patron is my patron
Current Partners

Nazareth College (private)
SUNY Poly (public)
SUNY Brockport (public)
Ithaca College (outside the region)
Roberts Wesleyan College (outside IDS Project)
The Second Grant

Goals for this current grant year include:

1. Moving the project outside the region ✔
2. Moving the project outside the IDS Project ✔
3. Beginning real-time Coordinated Collection Development (buying at the point of ILLiad request)
Serious Stumbling Block: The 800 lb Gorilla
Real Time Shipping Workflow

- Tested with two vendors and two libraries
- Success (2 day shipping) in both cases
Real Time CCD Swimlane Workflow

<table>
<thead>
<tr>
<th>Fisher ILLiad</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Request received in Borrowing; Awaiting Request Processing</td>
<td>Request does not meet Coll. Dev. Criteria; Fisher opts not to buy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Naz ILLiad</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Request arrives in Lending: CCD Rush Purchase Review queue, with CCD data filled into notes field.</td>
<td>Library staff sends template email to Acq staff OR CCD automatically sends report to Acq staff emails for purchase review.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-CCD Lending Library ILLiad</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Receives lending request, updates to shipped</td>
<td>Processes return</td>
</tr>
</tbody>
</table>
ILLiad Workflow at Receiving/Borrowing Library

Borrowing library receives request that is CCD candidate; alert sent via email to CCD.

Lending matches evaluate data on interactive webpage; say Y/N to purchase.

1st to say “yes” has request routed to lending item shipped, and rush ships via vendor directly to borrowing library.

If no CCD matches buy, request moves out to be borrowed within 16 hours.

Library processes borrowing returns, sends to purchasing library with CCD bookband.

Once received, borrowing library searches ILLiad, checks in, adds CCD book band.

Patron borrows and returns to their home library.
Purchase suggestion request (from borrowing library) alert arrives via email to CCD matches

If no matches buy, request moves to out to be borrowed within 16 hours

1st match that evaluates data and agrees to purchase will buy

Lending library ships via vendor directly to borrowing library

Once returned by lending library, process lending return in ILLiad

Auto-updated to Shipped in ILLiad/OCLC!

Acquisitions processes (physical & cataloging); sends to shelf
Real-time CCD Current Development

- Interactive webpages with email alerts to potential CCD-matching lenders
  - Part of web platform with 3 separate tabs:
    1. Your requests
    2. All requests
    3. Your ccd matches
  - Expiring within # hours (customizable)
  - Can send to subject selectors or acquisitions for input
    (No need for ILLiad training)
Expanding CCD API Usage: Other avenues

- Optional profiles for automatic alert based on conspectus
- Optional profiles for automatic purchase
  - Based upon CCD Report data
  - Buy-in and human touch required
- IDS “Wishlist”
Future Project Goals

1. Continue developing the sending of purchase requests to other libraries with an efficient shared CCD workflow
2. System interoperable with other systems, outside of ILLiad
3. Future, future goal: methods of assessment
   a. Catalog sweep
   b. Capture data on unique titles held
4. Evidence-based CCD for journals
Audience Feedback

1. What tweaks would be required to implement at your library?
   a. What length of time is reasonable for libraries to respond?
   b. How would this work at a large institution? A one-person shop?

2. What else might you want to see?
Questions