Resource Sharing + EAST:
An Onboarding Presentation

Tuesday, July 19th | 11am

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Agenda

- Resource Sharing in EAST
- ILL Best Practices
- EAST Lending Network
  - Rapid Pod
  - OCLC GAC
  - ILLiad and IDS
- ExLibris Rapido
- Resource Sharing Working Group
- Operations Committee
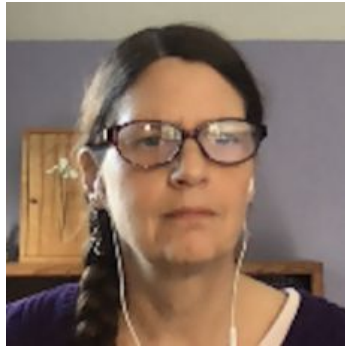- Perspective from a member library (Angie)

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The EAST Project Team & Guest Presenter

Susan Stearns
Project Director
sstearns@blc.org

Sara Amato
Data Librarian
samato@blc.org

Matthew Revitt
Shared Print Consultant
matthew.revitt@maine.edu

Mei Méndez
Project Manager
mmendez@blc.org

Angie Batson
Resource Sharing
Wellesley College

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Resource Sharing in EAST

"Membership in EAST is open to academic and research libraries in the eastern region of the United States that wish to participate in stewarding shared collections, for regional retention and loan. (EAST MOU, 1.1)

"All EAST members have the right to borrow materials from other EAST member libraries … EAST members are also responsible for lending to other EAST member libraries per agreed upon policies. (EAST MOU. 1.5)"

"EAST members strongly support a practice of free lending across the member libraries. EAST members may use their own institutional policies to fulfill requests for EAST holdings. Libraries may opt out of this policy. Libraries that choose to opt out of free lending may be charged to borrow from any other EAST member at the lending member's discretion.

"Members agree to deliver physical volumes upon request using existing ILL or consortial delivery methods. Members may require in-library use at the borrowing library for certain items (e.g. based on condition, rarity). Where possible, delivery will be made through scanning and digital delivery, e.g. for an individual chapter or article in the case of journals. Members will commit to deliver and return materials expeditiously via the established resource-sharing mechanism appropriate to each request. (EAST Major Operating Policies, p.2-3)"

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ILL Best Practices

- Written in 2016 by the ILL Working Group. Updated in 2017 to incorporate support for the Rosemont Access Principles.

- Aligns with the current ILL Code for the United States.

- Includes general principles, as well as more specific guidance around workflows in OCLC

- Currently under revision by the renamed and reconstituted Resource Sharing Working Group to meet the needs of an evolving resource sharing landscape, with less focus on specific tools or systems.

Resource Sharing Working Group

Re-convened in response to the 2020 EAST Program Assessment, which called for a deeper understanding of the resource sharing landscape in the context of shared print.

Consists of library workers from across the EAST membership.

Final draft of revised EAST ILL Best Practices document currently being reviewed by EAST Operations Committee before heading to Exec Committee, and then seek member approval

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EAST Lending Network

EAST has its own pod for returnables and RapidILL in **Rapid,** and as member libraries join, they are added when they complete their collection analysis.

EAST		Hide Pod >>
AUM	BMC	BMU
University of Massachusetts	Bryn Mawr College	University of Mass. Boston

Libraries are also added to an **EAST OCLC GAC**, see list of participating libraries and their symbols in the Member Resources section of the EAST website.

https://docs.google.com/document/d/1eD_yBhrg4X0tIVnf4rPfVKKXFXtRhw5Q/edit

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EAST Lending Network, cont'd

In addition, libraries that use ILLiad and have an **IDS** logic subscription can set up rules in IDS to prioritize borrowing/lending from and to other EAST libraries and assist in collecting ILL stats.

If your library does not subscribe to IDS logic, a discounted price is available for the first year for EAST members.

Please contact Mark Sullivan at IDS (sullivm@geneseo.edu) for details on the rule or to set up an IDS subscription.

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ExLibris Rapido

- Currently only available for Alma/Primo libraries
- If a library is using RapidILL for document delivery, the Rapido and Rapid pods are the same
- For returnables, a separate Rapido "private pod" for EAST is being planned based on survey of users
- Currently interoperable with ReShare, ILLiad for libraries that have ISO support configured and WorldShare ILL (as a last resort)
- Ex Libris is developing what they call "Primo Standalone" which will allow a non/Primo library to interface for discovery with Rapido so a non Alma/Primo library can use Rapido

Resource Sharing on the EAST Website

https://eastlibraries.org/retention-access/access/

- Resource Sharing Best Practices
- ILL/Resource Sharing Contacts at each library (forthcoming)
- GAC/Pod Information
- EAST Lending Network Information
- Resource Sharing Onboarding (webinar recording/slides/documentation)
- ILL Stats Task Force Report

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Operations Committee

- An elected committee of the EAST membership.
- Membership is balanced to include representation from all of EAST along Carnegie Classification.
- One seat always reserved for a Resource Sharing Working Group representative.
- Meet quarterly and provide guidance and expertise to the EAST Project Team on next steps for specific projects. Recently reviewed additions to the ephemera list and provided recommendations on whether to exclude specific publishers and keywords from future collection analyses.

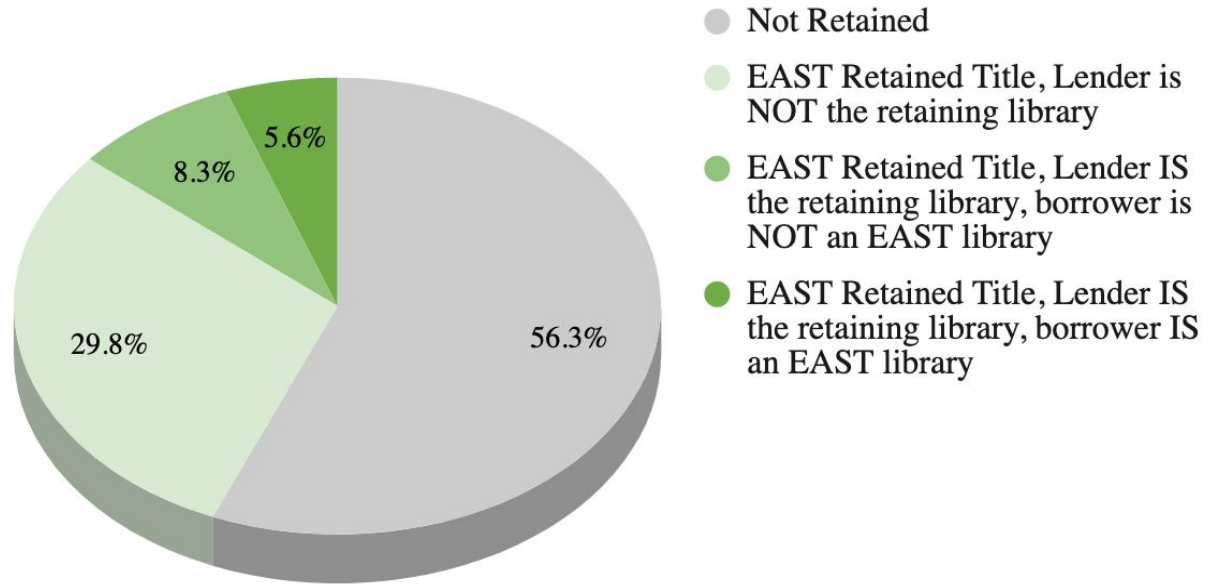EAST EASTERN ACADEMIC SCHOLARS' TRUST

ILL Stats Task Force

2019 GAC and POD

½ have a digital surrogate

11% have open digital surrogate

EAST Retention Status for all ILL Transactions

5.6%

8.3%

29.8%

56.3%

- Not Retained
- EAST Retained Title, Lender is NOT the retaining library
- EAST Retained Title, Lender IS the retaining library, borrower is NOT an EAST library
- EAST Retained Title, Lender IS the retaining library, borrower IS an EAST library

Looking at additional ways to collect transaction level data, e.g. IDS Add-on

EAST Member Perspective

Angie Batson, Resource Specialist at Wellesley College (WEL)

Access, efficiency, turnaround time and encouraged reciprocity are essential to resource sharing and EAST. Interlibrary Loan staff are responsible for ensuring EAST member libraries have access to materials across the membership.

ILL Workflow
- Become familiar with the EAST Resource Sharing Best Practices—it has important information you need to know
- ILL Requests from EAST libraries are received and requested using your ILL system and can be processed using your local workflow
- Your ILL system can be configured to send borrowing requests to EAST libraries first and unmediated if so desired.
    - Using Rapid, setting up custom holdings and direct requesting in OCLC and IDS logic are some examples of unmediated borrowing workflows.
- Lending requests from EAST libraries can be configured and processed along with all your other ILL requests or differently according to your local workflow and ILL system

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EAST Member Perspective

Advantages of EAST:

Access

- EAST OCLC GAC-RS: currently 96 libraries participating in this profiled group
- Rapid EAST POD: currently 44 libraries provide articles, 33 provide book chapters, and 22 participate in RapidR for returnables 24hr turnaround time for articles & book chapters
    - Real-time availability, automatically fills open access requests, can also fill requests from Reprints Desk
    - Expedited delivery of books (within 4 business days)
    - Libraries in multiple pods can pick and choose which pods to participate in for returnables (doesn't have to be all of them). You can choose to be a non-lender by type (electronic, print scan, or returnables).
- Special Collections: requests considered on a case-by-case basis instead of automatically cancelled
- Generous 16 week loan period
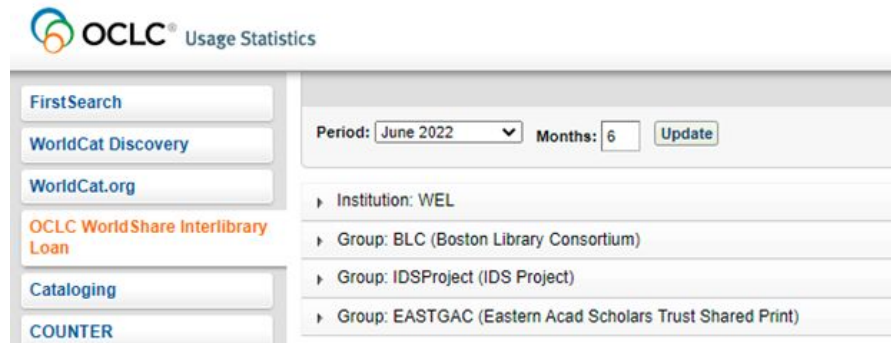- Daily processing and shipping of ILL requests (business days)

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EAST Member Perspective

IDS: IDS is an innovative, reciprocal, and inexpensive group that excels in efficiency and resource sharing. They help to create workflows at the local level using IDS logic. They now have over 120 libraries. (**contact info**)

Statistics

- East statistics are generated using the OCLC GAC and accessible and can be exported within the OCLC usage statistics module.

- Locally, I use ILLiad and have created an EAST group. I can use ILLiad web reports to see my borrowing and lending statistics using this group.

The benefit of networking with other EAST resource sharing staff. Our peers are often the best resource for troubleshooting and problem solving and sharing ideas.

Thank you.
Q & A

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