Fostering Radical Collaboration: The OCUL Collaborative Futures Project

Building on decades of successful cooperative work, the Ontario Council of University Libraries (OCUL) Collaborative Futures project aims to select and implement a shared next-generation library services platform (LSP), to manage and preserve print resources in a sustainable system, and to effectively and efficiently use a shared system for the management of electronic and print resources. Phase 1 of this project was completed in Summer 2015.

This is its story...

The Crew

from **17** of the 21 OCUL member schools, Scholars Portal and the OCUL pulled together into **5** working groups:

- * Shared Print Management & Preservation
- * Shared Workflow/Business Processes
- * Total Cost of Ownership

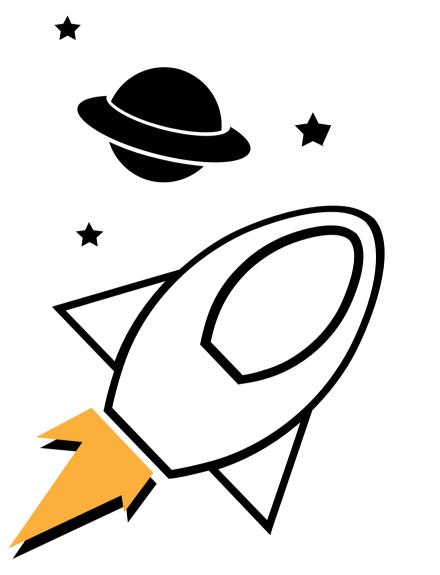
* Communications

Project led by Shared Vision Task Force (SVTF), which included chairs of working groups and library directors.

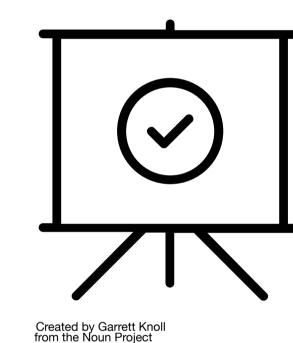
The Launch

Working groups began to collaborate virtually using dedicated wiki, listservs and teleconferences and talked to wider OCUL community via monthly webinar updates.

Communication between working groups was facilitated by in-person meetings, dedicated communications liaisons and working group updates delivered at monthly SVTF meetings.



Feb 2015



The Check-in

Entire project team met to discuss Business Case content and identify further work.

Outline for Business Case presented to OCUL Directors for feedback at their Spring meeting.

May 2015



The Market

OCUL issued a Request for Information (RFI) developed by the Market Research Working Group in consultation with OCUL members.

The Market Research and Shared Print Management & Preservation Working Groups conducted environmental scans of existing systems and shared print programs.

The Scope

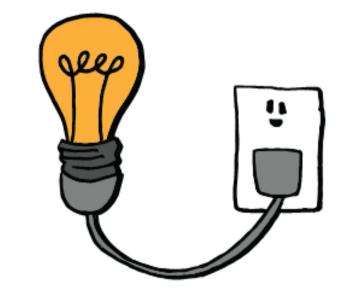
Project team defined the boundaries of the project through consultations with other library consortia and an intensive one-day workshop for the SVTF.



The Consultations

Project team consulted within OCUL using a range of information-gathering tools including surveys, follow-up communications to clarify responses, in-person and teleconference meetings with specific interest groups.

This information helped the project team build the Business Case.



The Business Case

Business Case delivered to OCUL Directors at Directors' Special Meeting.

- The Business Case included:
- environmental scan consultation findings
- 'lessons from other consortia

* initial cost/benefit analysis

July 2015



Collaboration Models

Collaboration

Systems

Distinct data sets: no common knowledge base but possibly shared discovery

Patron data hosted locally

Workflows

Partial Integration

Shared discovery with logically separable "views" of a shared knowledge base

Patron data hosted locally

Single shared instance with multiple

Consolidated data sets and shared discovery

Patron records are centralized, available to all staff

Catalogue and tech services are shared,

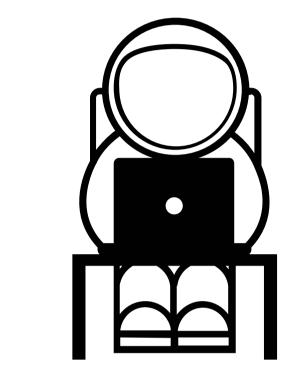
therefore no transfer of records required.

One authority record is shared across

E-resource fulfilment is centralized.

the consortium.

Total Integration



Expertise in creating or editing some central records is shared.

Common authority control is possible if individual institutions allow access to their bibliographic databases.

Shared Print Management

Shared collection begins to form around

The collection is de-duplicated across

Unless shared discovery is implemented

user access to print collections at other

low-demand print serials and monographs

Difficult to compare holdings

across institutions

the participants.

institutions limited to ILL.

There is increased benefit from shared ERM due to some centralized record loading.

Shared tech services helps make shared cataloguing possible.

Common authority control is possible if individual institutions allow access to their bibliographic databases.

Shared ERM exists, but individual institutions maintain financial and renewal information.

Shared system makes holdings comparisons easier but individual datasets with disparate metadata remain a hurdle.

Fully shared low-demand collection of print monographs and serials. Collaborative work on low-demand materials in complex formats (e.g., gov docs, scores, a/v, microforms) occurs.

Shared discovery allows direct requesting of materials from the shared collection by users at all institutions.

Single dataset in a common system facilitates consistent holdings information, streamlining comparisons across institutions.

Many print collections at participating institutions are fully shared, including new acquisitions. Collaborative work on complex formats is a normal feature of collections and tech services work.

Shared discovery allows direct requesting of materials from the shared collection by users at all institutions.



by Anika Ervin-Ward & Amy Greenberg



Next Steps

The Busines Case was approved by OCUL Directors. 18 OCUL member institutions are taking part in **Phase 2**. This phase will involve:

- * engaging the market and gathering requirements for a shared LSP,
- * developing shared policies and participant agreements,
- * writing a Business Plan for Directors' consideration, and
- * a decision by OCUL Directors on whether to move to Phase 3
- to acquire and implement a shared system.

