Northwest Interlibrary Loan & Resource Sharing Conference

Moving Forward: Gaining Momentum Through Collaboration

Portland Community College
Sylvania Campus in Portland, Oregon
September 16th–17th, 2010

8:30-9:30 Registration & Breakfast

9:30-10:45 Keynote Address

The Great Confluence of Resource Sharing Challenges: Managing Demands, Technology, and Operations

Denise Forro, Keynote Speaker

Interlibrary loan and resource sharing units face a deluge of challenges that pour into areas struggling with a wide variety of service and management issues. Patrons with comprehensive discovery tools in hand request materials that, in years past, would have been impossible to find, let alone supply. Their expectations have risen to higher levels and libraries strive to meet those needs. On the flip side are the budget demands of an economically threatened society and retrenchment of library resources. Streaming into this flow are technological advancements that promise more powerful means to meet these heightened requisitions. However, funds and staff are already strained in many institutions. Resource sharing operations overflow with service claims while managers seek workflow improvements. With the ebb and flow of these concerns, libraries search for and find creative and ingenious solutions, making the most of opportunities presented. This address will highlight this convergence and demonstrate that the resource sharing community generously shares not only materials but ideas, projects and innovation that ultimately leads to an onward course of research and learning.
Denise Forro is Head of Interlibrary Services at Michigan State University Libraries. She has been a librarian for 25 years and has worked in interlibrary loan/resource sharing since 1999. Denise chaired the Task Force charged to select a statewide delivery for MeLCat, the INN-Reach system for over 400 libraries in Michigan. Denise was the 2009-2010 Chair of the Sharing and Transforming Access to Resources Section (STARS) of ALA’s Reference and Users Services Association (RUSA). Denise instructs practitioners in the use of OCLC WorldCat Resource Sharing (Basic and Advance) for the Midwest Collaborative for Library Services. She serves as the co-coordinator for the ArticleReach Direct group, a consortium of academic research libraries, including a number of international partners. Denise is the author of several articles, including “The Role of an Operations Manager in Interlibrary Loan and Document Delivery Services.”

10:45-11:00 Break

11:00-12:00 Concurrent Sessions

A. Piloting Purchase on Demand: Collection Development through Interlibrary Loan
Ginny Sylvester, Marcia Anderson, Carol Kochan, Jennifer Duncan, Britt Fagerheim

From patron request to acquisition, innovative purchase on demand and “print streaming” programs are the focus of this panel presentation. Join librarians from Arizona State University and Utah State University for an informative and lively session, with time for questions and discussion.

Ginny Sylvester has been a librarian at the Arizona State University since 1981. She has been the Head of Access Services for over 20 years and has also managed interlibrary loan for more than 12 years.

Marcia Anderson is the Head of Bibliographic & Metadata Services at the Arizona State University.

Carol Kochan is the Coordinator of Interlibrary Loan Services at Utah State University. Jennifer Duncan is the Electronic Resources Librarian at Utah State University. She has her MLIS degree from the University of Texas at Austin.

Britt Fagerheim is the Distance Education Coordinator at the Utah State University Merrill-Cazier Library, and is a graduate of the MLIS program at the University of Washington.

B. Best Practices: How to move from Argh to Ahhh | Troy Christenson

Today’s ILL landscape has been changing dramatically. OCLC’s WorldCat Local discovery tool, WorldCat Navigator consortia partnering software and the ever growing internet has made it easier to identify and order materials by library clients. Much of these materials are not available through local resources or Consortia partners placing an increasing number of ILL requests. The economic downturn has frozen or eliminated many staff positions in libraries including ILL operations. The objective of this interactive presentation is to help those working in ILL departments today by offering methods on how to do more with less in this continuously changing environment.

Troy Christenson has a Masters Degree in Business Administration, a Masters in Library and Information Sciences and a Bachelor's Degree in Management. He has over 25 years library experience, managing ILL operations for the last fifteen years. An active member of both the Washington Library Association and the American Library Association, Troy was recently appointed to serve on ALA STARS / LLAMA Cooperative / Remote Circulation Committee.

12:00-1:30 Colleague Lunch: What have you heard lately at conferences?

- ALA
- IDS Project
- ILLiad
- WorldCat Discovery Day
- PNLA
- Timberline Institute
Amazon's Kindle device lets libraries acquire new titles in just three minutes. Learn how loaning Kindles can deliver "Instant ILL" and never-before-possible immediate access to bestsellers and new releases. Loaning a new technology offered insights -- and raised questions -- on areas as diverse as promoting new services, revising borrowing policies, cataloging multi-volume portable books, cost effectiveness, user acceptance, and copyright implications. Both the conceptual view of E-Book reader loans and practical issues will be discussed.

Joyce Neujahr has been an elementary school library media specialist, coordinator of the Summer Reading program at her public library, and is regularly asked to participate as a guest instructor of library science classes at the University of Nebraska – Omaha. She is currently Director of Patron Services at the University of Nebraska – Omaha, Dr. C.C. and Mabel L. Criss Library and an adjunct instructor at Central Community College in the Library & Information Services program. Neujahr received her Master of Library Science degree from the University of Missouri – Columbia.

Chelle Batchelor is the Access Services Librarian at the University of Washington Bothell and Cascadia Community College Campus Library. She has been working in Interlibrary Loan and circulation units since her first “real job” working for Joanne Halgren as a student employee in Interlibrary Loan s at University of Oregon. Chelle has always had an interest in training technologies and has been exploring web-based methods of creating departmental documentation and training materials since the mid 1990s.

Erin S. Silva is the Document Delivery and E-Reserves Librarian at the University of Nevada, Reno. She received a B.A. in Communication Studies from Truman State University and a M.S. in Library and Information Science from the University of Illinois at Urbana-Champaign. She has been working in academic libraries since 2005 and has been specifically involved in interlibrary loan since 2007.

Lisa Kurt is the Head of Electronic Resources and Serials at the University of Nevada, Reno. She has previously worked for the MIT Libraries and the Massachusetts College of Art Library with experience in public and technical services. She
received a B.F.A. in Design from Massachusetts College of Art and an M.S. in Library and Information Science from Simmons College.

B. Training ILL Staff for the Future | Lars Leon

What will Resource Sharing services look like in the future? What will other library services look like? We will present key research findings and then focus on the types of staff development needed. We will begin the conversation to identify actions that individual libraries and the Resource Sharing community can take to have the staff of today ready to help provide the services of the future.

Lars Leon is the Head of Resource Sharing and Delivery Services at the University of Kansas Libraries. He has participated in a variety of service activities from the state level in the Kansas Library Association Interlibrary Loan Roundtable, the Greater Western Library Alliance (GWLA), various ALA committees including some RUSA STARS committees, to the IFLA Document Delivery and Resource Sharing Committee.

3:45-5:15 Exhibitor Demonstrations & Reception
- On Demand Books
- OCLC
- Ebrary
- Atlas Systems
- Ebsco

Friday September 17th

8:30-9:00 Breakfast

9:00-10:00 Concurrent Sessions

A. GIST | Cyril Oberlander, Mark Sullivan & Tim Bowersox

The Getting It System Toolkit (GIST) (http://gettingitsystemtoolkit.wordpress.com/) provides a new model and useful tool to integrate and optimize acquisitions and interlibrary loan services and to promote regional collection diversity. The State University of New York Geneseo GIST Team develops and shares these customizable and flexible tools for libraries, as they have done with the IDS Project Workflow Toolkit (http://workflowtoolkit.wordpress.com/) which has been nationally recognized and widely adopted by library consortia and resource sharing system vendors. In particular we want to highlight the new gift and de-selection tools recently added to the GIST model.

Cyril Oberlander is the Associate Director of Milne Library at the SUNY College at Geneseo since January 2008. Prior to that, he was the Director of Interlibrary Services at the University of Virginia Library 2005-2008; and Head of Interlibrary Loan at Portland State University from 1996-2005; and before that served as the Assistant Supervisor and the Staff Trainer for Access Services. His consultation experience includes independent consulting services through OCLC, and workflow design with various vendors. Research interests include: organizational development, workflow design, mobile technology, information visualization, and knowledge systems.

Tim Bowersox is the Information Delivery Services Librarian at the SUNY College at Geneseo and is also a member of the IDS Project’s management team, in which he also serves as the Coordinator of Mentors and Training. He is the editor of the Workflow Toolkit and is also part of the development team for the Getting It System Toolkit. Tim has been involved in resource sharing for over six years and received his Master of Library and Information Science degree from Kent State University.

Mark Sullivan is the Systems Administrator for Milne Library at SUNY Geneseo and for the IDS Project since its inception in 2003. He is the lead programmer for the Getting It System Toolkit (GIST), which includes GIST for Web and the Gift
and De-Selection Manager, and for the Article Licensing Information Availability Service (ALIAS). Prior to joining Geneseo, he was the Reference Librarian for Computer Services at Vermont Law School.

**B. ILL In Public Libraries Unconference** | Sam Sayre and Rachel Short

Join us for the first ever NW ILL un-conference session! This informal discussion forum will be moderated by a public library ILL practitioner and a longtime OCLC resource sharing trainer. Possible topics include policies and procedures, workload and workflow, choosing and using integrated ILL systems and much more. Come prepared to share your own stories, challenges and successes and learn from others.

*Sam Sayre* is a trainer for OCLC based in Portland. He has been with OCLC for the last twenty years mostly specializing in resource sharing. Before that he was at Reed College where he did interlibrary loan using OCLC and claims to have made every mistake possible at least twice.

*Rachael Short* has been working at the Multnomah County Library for 15 years. She just finished a five year stint as 'Lead Worker' of their Interlibrary Loan department. In 2008 she spearheaded their implementation of ILLiad, a challenging but thoroughly worthwhile experience. She is a current MLIS student at the University of Wisconsin-Milwaukee.

10:00-10:15  **Break**

10:15-11:15  **Concurrent Sessions**

**A. Navigator Update** | Anya Arnold & Rick Peterson

*Anya Arnold* is the Resource Sharing Programs Manager for Orbis Cascade Alliance. In that role she coordinates and leads collaborative groups composed of vendors and member library staff, develops recommendations and oversees the day to day workings of WorldCat Navigator the consortial resource sharing program developed by OCLC. Before and after obtaining her MLIS from the University of Pittsburgh she worked at OCLC and played a lead role in numerous strategic program development and technology initiatives within Resource Sharing.

*Rick Peterson* is the Access Services Manager at Lewis & Clark College’s Watzek Library. He led initial training sessions for WorldCat Navigator during the Orbis Cascade Alliance Summit migration in 2008 and is currently chairing the Circulation Staff Interface workgroup as part of the Alliance’s Summit Planning and Operations Team. Prior to his move to Lewis & Clark, Rick worked at the University of Oregon Libraries.

**B. Copyright Update: Google Books and More** | Brian Rowe & Rachel Bridgewater

*Brian Rowe* is the founder of Freedom for IP & New in IP. He interned at Creative Commons in 2008, working on public domain and noncommercial use in copyright, and spent part of 2009 in Washington D.C. on a Google Public Policy Fellowship, working at Public Knowledge on copyright and FCC issues. Brian serves on the Washington State Access to Justice Board’s Technology Committee, and is an alumnus of Students for Free Culture. Last year Brian wrote a mock trial for the Future of the Law Institute employed by high school students learning about fair use of music and bloggers' rights. Brian also helped plan the Seattle Law of the Commons Seminar.

Brian has a background in information technology. He holds a B.S. in Informatics and B.A. in Political Science, both from University of Washington, and a J.D. from Seattle University. Brian teaches Policy, Law, and Ethics in Information Management at the University of Washington's Information School. Connect with Brian online at http://brianrowe.org or through Twitter or Identi.ca (user name: Sarterus).

11:15-11:30  **Break**

11:30-12:30  **Concurrent Sessions**
A. Getting the Most from Your ILL Statistics | Mary Van Court

ILL applications create all the basic statistical reports you need. But what if you want to do more? This session is designed to give you some ideas of how you can use Access and Excel to compile statistics to look at them in a different way. You can pull in call numbers from OCLC reports and combine them with data from your ILL application to create reports for collection development. You can use data to organize your work more efficiently. Or you can produce invoices and run financial reports. Once you get the basic techniques, you'll be ready to develop the reports you need to make your data work more effectively for you.

Mary Van Court has worked for the University of Washington Libraries for 29 years, most of it at the Health Sciences Library. Recently the main Interlibrary Loan unit merged with the Health Sciences Library's Document Services unit. Mary participated in the harmonization team and played an active role in supporting the technical aspects of the merge. This included using Access and Excel to compile a variety of statistics used to plan workflow, support collection development and create financial reports.

B. Using Change to Strive for Excellence – ILL at the University of Alberta | CJ de Jong

This presentation focuses on the restructuring of the ILL workflow at the University of Alberta Libraries. The goals for restructuring included the ability to accommodate a possible increase in borrowing requests with the implementation of WorldCat Local, staffing changes due to retirements, and removing our EMST status. The restructuring made use of benchmarking, workflow changes, collaborating with and combining units, and implementing strategies to make use of the full potential of our ILL system (Relais). The resources of the University of Alberta Libraries comprise one of the major research collections in Canada. We are a net-lending institution.

CJ de Jong is the Access Services Coordinator at the University of Alberta, supporting one of the major research collections in Canada by coordinating interlibrary loans, reserves, holds, discharging, and stack maintenance. Formerly, he was the Access and Reference Services Coordinator at the University of Winnipeg, Manitoba. He has co-published an article on distance education, and presented at various conferences on topics related to interlibrary loans, information literacy, and reference services. CJ can be reached at cj.dejong@ualberta.ca.

12:30-1:30  Colleague Lunch with Cool Tools: Good Food and Gadgets
- Mobile Phones
- Ebooks & Readers
- DOCLINE
- OCLC Direct Article Request

1:30-2:30  The Final Word & Closing | Denise Forro
The registration table will be located in the PAC.
Special Thanks to...

Exhibitors
- On Demand Books
- OCLC
- Ebrary
- Atlas Systems
- Ebsco

Committee Members
- Margaret Bean, Conference Chair
- Chelle Batchelor
- Deborah Carroll
- Troy Christenson
- Isabel Encinas
- Linda Fredriksen
- Kerri Goergen-Doll
- Heidi Nance
- Keith Palmateer
- Alicia Salaz
- Erin Silva

Conference fiscal agent & support:
OCLC Western Service Center
- name?

Presenters
Marcia Anderson
Anya Arnold
Chelle Batchelor
Jennifer Duncan
Britt Fagerheim
Denise Forro
CJ de Jong
Carol Kochan
Lars Leon
Joyce Neuhar
Cyril Oberlander
Rick Peterson
Brian Rowe
Sam Sayre
Rachel Short
Erin Silva
Ginny Sylvester
Mary Van Court