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CAUL-CBUA Resource Sharing Service Needs Assessment

With the move to the direct support model for RelaisILL technical support in 2017, and the discontinuance of the Relais Administrator position, there has been a noticeable void for the shared service (broader than the shared RelaisILL system) in terms of the leadership and operational roles which were included in the responsibilities of this position. These roles include:

- Visioning the future direction of the shared service in light of member needs and priorities, and being cognizant of emerging trends;
- Policy revision and development;
- Procedures and documentation revision and development; and
- Website maintenance

At the 2018 DDG AGM, there was an initial discussion around the idea of developing a community of practice to support and enable community engagement around the shared service. Corinne Gilroy, who has a research focus in the area of communities of practice, provided an overview of this model and followed up by distributing an article to DDG members to prime further discussion. Unfortunately, the momentum did not carry through after the AGM. To re-ignite this line of investigation, it is proposed that a working group be formed to investigate the viability of this model for supporting DDG member engagement and discussion around shared challenges, emerging trends, and idea incubation. The working group will be responsible for developing recommendations for consideration by the DDG, and ultimately, approval by the CAUL-CBUA Board.

Beyond support of DDG members as a community of practice, the DDG also needs to address the leadership needs for the shared service. As such, it is proposed that per recommendation one of the CAUL-CBUA Relais Optimization Working Group's Final Report, a sub-committee of the DDG should be created to fill this functional gap. Canadian consortial resource sharing support structures are included in Appendix A to facilitate the creation of terms of reference for the Sub-Committee.

Under the auspices of the Sub-Committee:

- Per recommendation two of the Working Group's report, a working group should be created to comprehensively review shared policies and procedures and recommend revisions.

- Per recommendation three of the report, a working group should be created to collect, update, and/or create training documentation, as well as identifying immediate and ongoing member training needs for consideration by the Sub-Committee.
- Per recommendation five of the Working Group's report, a working group should be created to review and assess the Relais ILL reporting functionality against member report needs to provide recommendations to address the reporting needs of members. Additionally, this working group should investigate options for extracting statistics from RelaisILL to support member needs.

Appendix A: Canadian Consortial Resource Sharing Support Structures

OCUL

In OCUL has the a “Resource Sharing Community” which operates much like a committee.

Terms of Reference

The OCUL Resource Sharing Community brings together OCUL members who have roles in supporting resource sharing (interlibrary loan) activity within OCUL as well as in the national and global context. The Community works together to promote resource sharing services in academic libraries by formulating policies and procedures, by advancing and supporting emerging trends (e.g. interlibrary loan of e-material), and by addressing relevant copyright, licensing and delivery issues.

Established in 2013 this Community is a consolidation of the existing OCUL VDX users group, which was created with the introduction of RACER (Rapid Access to Collections by Electronic Requesting) in 2003, and of the earlier OCUL ILL group. As resource sharing activities are integral to the OCUL mission, this is envisioned as an ongoing Community.

Membership in the OCUL Resource Sharing Community is open to all OCUL member institutions. Community membership is at the discretion of each institution and may include more than one person from an institution.

Currently there are 2 moderators, Alison Campbell (U of T) and Vera Fesnak (Wilfrid Laurier University).

Meeting Frequency - Once a year (OCUL Resource Sharing Day) at one of the member institutions.

COPPUL

COPPUL has no standing committee, although working groups are created as needed. Resource sharing is coordinated through provincial organizations, such as NEOS in Alberta and BC ELN in BC.

BCI

Since 2008, the BCI has had a permanent ILL Operations Consensus Group (GCPEB). Last year, this group expanded their terms of reference to meet emerging needs related to their common project of purchasing a library management software (PPS). This committee is now called the Documentation Access Working (GTAD).

There 18 universities in Quebec, however, the group only has ten participants. Their mandate includes representing members not directly at the table. In a normal year, the Group meets 4 or 5 times, or more often as needed for special projects.

The Group’s **terms of reference** are below (excluding points related to the PPS project):

- Develop strategies to support the collaborative management of document circulation and interlibrary loan operations and coordinate their implementation.

- Develop common policies for document circulation and interlibrary loan and ensure continuously updating.
- Develop effective tools for collaborative management of document circulation and interlibrary loan operations.
- Coordinate development and ongoing management of the Colombo system, including budget tracking.
- After consultation with all users of the system, prioritize needs and recommend to the Library Subcommittee (board) any appropriate modifications or adjustments for the improvement or development of the Colombo system.
- Identify priority collective needs and harmonize loan policies.
- Coordinate the production of reports, including statistical reports.
- Report regularly to the Library Sub-Committee on the work of the Working Group.