

Resource Sharing in Ohio  
Tech Connections3  
May 16, 2001  
Fawcett Center

Some folks in this audience may not recognize me—I've been in my OPLIN cave all winter even more than usual and not out and about as much as I like. Between 2-3 significant projects and political distractions we haven't even managed to get out our newsletter ---I'm not behind a PowerPoint presentation. I'm here to speak on behalf of the State Library of Ohio, and all those people from various libraries that have labored long and hard to bring about full statewide resources sharing.

Now, as I begin to talk it occurs to me, we *have* resource sharing in Ohio. We have a lot of it. We have resource sharing all over the state. What we do not have is full coordination of all the pieces, and a technology tool that opens up all the resources to the general public. The desire to develop ways to share existed long before I was hired to shepherd OPLIN, and long before we began to put in place the technology overlay we are currently building.

A year ago when some of us began looking at what was happening statewide we were astonished by the extent and the diversity of projects. There are large consortia (Clevnet, SEO) and small consortia (CLC, Discovery Place) with shared catalogs doing real time shared circulation; there are counties, (Preble county comes to mind but there are others) that have quietly moved to shared catalogs without much noise, structure or fancy names. There are local and regional agreements of a number of kinds already in place. We counted well over a dozen, and believe almost half of all libraries were involved. All of them have contributed to giving Ohio libraries not only access to more material, but in creating widespread, *unprecedented* expertise about and comfort with direct patron borrowing, and sharing of resources. This experience is the real backbone of any statewide resource program.

**So** what are we trying to do, and what is the status of the project?

We set out to create nothing short of a statewide circulation system. Our ultimate goal is a state in which the customer of any library can, by their own power, request material from any other library and have it delivered, and to do this in a way that enhances and does not diminish the relationship of the customer to their local library.

To create fully coordinated statewide resource sharing we need to do three things. (*only three things you ask?* Yes. But they are big ones.)

1. ***We have to agree to do it.*** That is huge. Don't underestimate it. OPLIN's annual connectivity survey (which by the way if you haven't completed – and you know who you are—please do complete and return) we asked public libraries if they plan to participate. The response so far has run around 90% yes. **90%!** Arguably we've all agreed to do it.

When I say that is huge, I should tell you that when I talk to other states, as I'm frequently given a chance to do, I am astounded at how much more agreement and clarity of purpose there is in Ohio on this score.

We also need a structure in place for governing it. The critical thing to me is that libraries need a voice in how sharing is done. We have that in the form of the Statewide Resource Sharing Steering Committee, and the policy task force of that steering committee. One piece that has gotten away from us is centralized communication. A group is working on the resource sharing Web information right now. If you haven't checked on it in a while, check back June 1. (Not this week—we're all here.) The URL is

<http://winslo.state.oh.us/publib/swrs.html> .

2. ***We have to have a way to get material from point A to point B.*** That one is even bigger. As you know, the State Library issued an RFP for a delivery partner. Responses to that RFP have been received and will be reviewed soon. The expectation is that we will have a contract in place July 1, 2001. The belief is that once a true statewide delivery loop is in place, it can serve all libraries of all types regardless of the source of the request for material. [pause!] That, is whether a

request comes to your library from one or more consortia that you belong to, or it comes from a fax (or carrier pigeon) from another library or from an old fashioned ILL request, or, from central system we are building, it can be put on the delivery route and transported to another Ohio library. Delivery alone will extend your ability to share more widely as soon as it is in place.

3. ***We have to have a tool that empowers our customers to request material.*** Mike Lucas has called that the “technology overlay.” That one is *really* huge. If we do it well, it’s the magic in the middle. It’s the requesting system. It’s the bridge between libraries, or in technology terms, it’s the bridge that will allow messages to pass between disparate types of shared and standalone catalogs.

Remember that OPLIN survey? You have a lot of confidence in us, and it is flattering. (I’m also terrified! Expectations are high)

What did we buy? It is not a turnkey system. It isn’t a car we can get in and drive. There isn’t one. If there were, we’d have bought it. Nothing out there did exactly what Ohio wanted. We selected a system with “some assembly required.” *It will in fact be a long and tedious systems integration project. Difficult, not impossible.* The selection committee believed that given the real choices available to us, it was important to select a vendor with a strong commitment to standards-based processing, a vision of full document delivery, and a commitment to work in partnership with others in the library community (including ILS vendors) to make it work.

For it to work well there are three elements—a strong software vendor, (and we believe we have that in Fretwell Downing), commitment from local library system vendors to implement standards in their systems (that is growing but we have to make it clear that we demand and expect full standards implementation) and there is the quality of the local catalog itself (some things will be influenced by local cataloging practice—don’t push me for details, but you can be sure there will be some).

This project will not be fast; it will not be easy. Those of you who know me know that I tend to set my expectations very high, and I have been frustrated that it is not further

along. I want everything done in a "Carol Year" which is about seven days. It has been pointed out to me that it is more important to do this one Right than to do it Quick.

In the last newsletter from the steering committee, we laid out the broad outlines of the implementation plan. The order in which things have to happen is very clear.

The central site has been installed. The hardware, operating software, database, access, firewall, security and network issues have been resolved and the software has been installed -- out of the box.

We are building what I've been calling the prototype, and what you might also think of as the demonstration system. We have a lot of kinks to unbend and connections to make. We're working to insure that it is done well. The system is more than the software. Until we to populate the locations database, have all the business rules programmed, and, even more important, get the handshake on both ends working well, we have nothing to show in public. Once the prototype is complete, and we've refined and documented what we need to do to implement other libraries, we'll finish our acceptance testing and move on to implementing the live system. The pieces are falling into place, and we expect both a software upgrade, and some work on the database to be completed within the next few weeks. We'll know more then. We will not move forward until we are ready.

The best news is that on Monday two people were added to the implementation team. They are independent contractors but we will be demanding their full attention for the next sixteen months. Many of you may know them. They are Carol Bradsher, and Don Yarmon. Both bring very strong skills to this project and we are delighted to have them. We can begin to proceed more rapidly on a number of fronts at once with their participation.

We've been calling the first phase of the live system the "First Wave." By that we mean that once the kinks have been worked out we will schedule meetings with those libraries that have the same type of local system as the ones in the prototype. It is my expectation that once we do a single system of a certain type (DRA Classic for example) we will know how we're going to do *all* the systems of that type. I'm prepared for it to not be

that simple, however. We have been saying so far that we will have DRA Classic, MultiLIS and Dynix in the prototype. The First Wave meeting invitations will likely go to libraries using those systems. The recent announcements about the demise of Access Ohio may impact that decision, however.

In the meantime, very shortly after the completion of the prototype, we will also begin looking at the dozen or more other systems out there in libraries. We have already begun a dialog with some of the companies. Our first goal will be to do some basic testing and research to determine which systems are capable of fullest participation, which vendors are interested in working with us to ensure fullest success and which will be, frankly, easiest. Once we've determined an order, we'll select one library of each type to go first, just as we did with the prototype. What we've called the "Successive Waves" will occur system by system as we've worked out the process for each type.

What then? Still more to do. We'll upgrade as emerging data standards are developed. Adding services for fax and photocopy will require some policy discussions. Electronic document delivery will need careful planning. First we have to do the basics.

Now, all of that doesn't help staff that want to know, yes but exactly what am I going to have to do? What does it look like? How do I use it? Is it harder than what I do now? Will what I do have to change? (\*\**change*\*\*? Yipes!) **When will we have it? What will it be?** For all of them, I have some bad news. We don't have any details yet. Evolution will be gradual, but the work will progress at a steady clip in a sure direction.

However, once the demonstration system is in place, the very next task is to prepare workflow and training information and begin to conduct public forums. We're calling them "pre-implementation" meetings. At that time we'll be able to carry this discussion down to a more concrete level. In the meantime, if you are talking to system vendors and they have questions for us, please send them my way.

Now if you'll give me a moment to make sure my armor is buttoned, I'd be happy to take questions.