CRSP Resource Sharing Recommendations to COLD

April 23, 2016

Draft 2.b

**Introduction**

The ULMS will enable opportunities for the libraries in the CSU system to support students and faculty as never before. The CSU libraries will be able to leverage “the power of 23” to rethink how we acquire, share, and maintain traditional and electronic resources, and also rethink our relationship with third-party products we have relied on for rapid, high-quality fulfillment. New governance models for systems management will encourage user-centric policies and procedures while ensuring the highest standard of service and practices.

To fulfill this vision, a new resource sharing model for the 23 CSU libraries needs to be intentional, planned, evidence-driven, and above all, sufficiently resourced. What follows are the data, assumptions, and recommendations from CRSP to COLD.

**Guiding Data**

The following data and other evidence guide the assumptions driving CRSP’s recommendations (FYI all these require citations and endnotes):

1. With agreement to move to the ULMS, resource sharing among the 23 libraries became a given.
2. Resource sharing at the system level requires a sustained level of effort from the ULMS team that will continue indefinitely post-migration.
3. The 13 libraries using third-party INNReach services for monographic fulfillment (Link+ and Circuit) are on average experiencing gradually declining usage of these services, but together continue to represent value to CSU users.
4. Usage and holdings data for monographic borrowing among the CSU libraries indicates that the CSU libraries have the capacity to support most known-item requests. (Data point to be added: David Walker’s holding and usage analyses)
5. Research on undergraduate search behavior indicates that students are primarily “content tourists” who are not seeking known items, suggesting that the known-item fulfillment capacity may meet or exceed user needs. (Citation from scholarly literature)
6. The ULMS provides opportunities for integrating with ILLIAD, which would increase the discovery-to-delivery reach of the ULMS for CSU library users, and would not preclude third-party integration with ILLIAD-based premier monographic fulfillment services such as Rapid-R. (Data from correspondence with Orbis Cascade and Anya Arnold)
7. The ULMS changes the governance model for library systems management to one that is shared and participatory, and will require close, continuous engagement with COLD-appointed committees and communities of interest in the CSU. (Data from correspondence with Orbis Cascade and Anya Arnold)
8. The ULMS opens exciting possibilities for new e-resource acquisition models, such as system-level ebook purchasing. (Data point to be added: the EAR ebook pilot)
9. Although CSU ILL departments have been resource sharing together for years, a CSU-wide shared library management and resource-sharing system is new terrain and will require insights and guidance we cannot fully provide internally. We would benefit from looking at the experiences and system designs of other resource-sharing models. (Data from correspondence with Orbis Cascade and Anya Arnold)
10. The shift to ALMA-prioritized system-wide resource sharing will benefit from a CSU-wide communications campaign designed to manage user expectations and set the groundwork for change. (Data from correspondence with Orbis Cascade and Anya Arnold)

**Resource Sharing: Seven Core Recommendations**

1. COLD agrees to a “CSU first” model of resource sharing in which the 23 libraries commit to lending and borrowing of returnables and e-resources within ALMA as the first tier of their resource-sharing model.
2. COLD asks the CO to commit to hiring a permanent position that will continue indefinitely post-migration, dedicated primarily to supporting resource sharing among the 23 libraries (see Attachment A, role of the CSU Libraries Resource Sharing Manager).
3. COLD agrees that third-party ULMS integration for INNReach (Link+, Circuit, Rapid-R, IDS, and other products) is a local decision, the cost of which will be borne at the local level.
4. COLD asks the CO to implement ALMA-to-ILLIAD functionality for all 23 libraries.
5. COLD agrees to the CRSP budget request to fund a consultant for ALMA resource-sharing to help advise and guide the CSU libraries through the ULMS migration process.
6. COLD agrees to a budget request to fund a communications campaign prior to the ULMS launch to build buy-in and awareness of the ULMS and new resource-sharing services.
7. COLD agrees to establish a governance unit within COLD to advise the CO on resource-sharing practices, policies, and procedures, and serve as a voice for the CSU libraries on issues related to resource sharing.

**Resource Sharing: Five Additional CRSP Recommendations**

1. To support equitable access to all CSU students and provide a high-quality user experience for all CSU library users, COLD agrees to standardized lending and borrowing policies and practices for resource sharing wherever possible and practicable.
2. COLD encourages close cooperation among COLD resource sharing governance units, CSU-wide communities of practice, ULMS committees, and the ULMS management team.
3. COLD asks ISPIE to engage the resource sharing community in identifying best practices for system-wide resource sharing as well as identifying impediments to adopting a ULMS-first resource sharing model.
4. COLD recommends establishing a CSU-wide RAPID pod to make RAPID available to all CSU campuses, regardless of size or academic model.
5. COLD asks EAR to recommend the design for a pilot for acquiring system-wide ebooks, predictive as well as on-demand, to commence with the 2017-2018 academic year.