



# The Rethinking Resource Sharing Initiative Annual Report

January 2007 - June 2008

Prepared by: Rethinking Resource Sharing Steering Committee  
[www.rethinkingresourcesharing.org](http://www.rethinkingresourcesharing.org)

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The Rethinking Resource Sharing Initiative receives support from many sponsors in the library community. Thank you to all who have made this year successful!

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# The Rethinking Resource Sharing Initiative

*Inspiring Libraries. Empowering People.*

## Why Rethink?

The web, search engines and social networks have changed users' information expectations and behaviors. The world is smaller, geographic boundaries are blurry, and the web empowers everyone to take information needs into their own hands.

Users and library services are out of synch with each other. As the individual is offered more choices that compare to traditional library services, they will choose the easiest and most rewarding experience. We want that experience to be through the library!

*Now is the time* for librarians to seriously re-evaluate how traditional resource sharing practices fit with the lifestyle of current library users and non-users. Rethinking resource sharing efforts lead librarians to analyze the full process - from discovery to delivery and all considerations in-between.

The Rethinking Resource Sharing Initiative (RRSI) realizes that there are many things to consider when looking at change:

- What are the *User's Needs*? In the world of Amazon, eBay, Google and Netflix how can the library meet users in their environment to satisfy and ultimately exceed their expectations as libraries compete with the ever innovative web. How do users' needs compare with libraries needs?
- How are *Library Policies* helping or hurting the move to new resource sharing methods and innovative approaches?
- How can systems best *Interoperate* to facilitate resource sharing and provide effective, seamless tools?
- What *Marketing* tools and assistance can the Initiative provide to librarians as they lead the "rethinking" discussion in their libraries and networks?
- What *Delivery* methods are recommended, competitive and effective? How can libraries implement innovative delivery methods?

The RRSI has dedicated a committee to each of these areas - User Needs, Library Policies, Interoperability, Marketing and Delivery.

As with all long-term strategic planning, rethinking resource sharing is an on-going exercise and can't be done in isolation. The RRSI recognizes this and is fostering a community to support innovation and change. The committees lead individuals in doing the good work to create results. This document reports on the work of the RRSI committees and community.

**Note:** In May 2008, the Steering Committee voted to change the fiscal year of the RRSI from a calendar year to July-June. This report covers activities from the 2007 calendar year and the first half of 2008.

## The Initiative

The RRSI is an ad hoc group that advocates for a complete rethink of the way libraries conduct resource sharing in the context of the global internet revolution and all of the developments that have arisen from that.

The RRSI started in the U.S. in 2005 with a white paper written by a group of librarians, product vendors and library technology specialists. While working on revising resource sharing technical standards, they began to feel as though they were trying to improve a protocol that was becoming increasingly obsolete. It was rather like refining the typewriter protocol when the world had already moved on to the computer. And more importantly, resource sharing practices and policies continued to be library-centric while the rest of the world had already moved on to being consumer-centric.

Thus, the group felt it was time to wipe the slate completely clean and start over with some new concepts. A white paper was written and a revolution born!

The participants in the RRSI hope that you will join us in advocating for a revolution in the way libraries conduct resource sharing. Feel free to contact any of the members of the Steering Committee to find out how to get involved.

## Governance and Charter

In May 2008, the Steering Committee revised and approved a new Charter for the RRSI. The charter modified the structure of the Steering Committee, formalized term lengths and restated the purpose of the RRSI. The mission and purpose of the RRSI is:

- To foster an updated framework of cooperation and collaboration.
- Rethink resource sharing for the 21<sup>st</sup> century
- Be a catalyst movement for systematic change
- Become an influential “think tank” that defines and promotes best practices
- Inspire a change in attitude in providing services
- Encourage libraries to open up to find new ways to serve, not just their patrons, but all potential users

This group does not bring products to market, but encourages and reach out to groups interested in creating technical solutions that support these efforts.

### Goals and Results Summary from January 2007 - June 2008

In November 2006, the RRSI Steering Committee Members and Committee Chairs defined goals for the new year. The major goals and results are summarized below:

*Goal: Focus the RRSI's messaging and branding*

**Results: Created a Facilitators' Guide for libraries discussing the Manifesto  
Created name and branding for “Go-Getter” Prototype  
Introduced an RRS logo and stickers for conferences and outreach**

*Goal: Outreach to the library community through events and presentations*

**Results: Hosted Forum III in Chicago  
Instituted the RRS Innovation Awards  
Gave seventeen presentations and authored three publications  
Sponsored and organized the ALA Pre-Conference, “Throw Off Your Policies and Expose Your Resources: Rethinking Resource Sharing”**

*Goal: Broader international exposure and participation*

**Results: Gave presentations in South Africa, Singapore, Italy and Denmark  
Translated the *Manifesto* into French, Spanish, and Portuguese  
Organized the IFLA Satellite Meeting, “ Rethinking Access to Information: Evolving Perspectives on Information Content and Delivery”**

*Goal: Complete the GoGetter prototype*

**Result: The GoGetter prototype was completed and is pending open source licensing**

## The Rethinking Resource Sharing Manifesto

If libraries want to expand and promote information accessibility, and to continue to be valued resources, we believe that libraries must improve their information delivery system. Aligning resource sharing workflow, collection policies, and discovery-delivery systems by significantly reducing service barriers and cost, and offering user service options are critical pieces that promote information access.

We believe that the user should be able to get what s/he wants on the terms that s/he chooses without undue hurdles from the library community. As libraries are making their collections visible on a global scale, so should they provide an international resource delivery system or a service model that combines the strengths of all participating libraries. Toward that end, we believe the following principles embraced by libraries and librarians will encourage the sort of resource sharing and delivery that will enhance the role of libraries in the expanding information environment while maintaining the integrity of the institution's mandate and collections:

1. Restrictions shall only be imposed as necessary by individual institutions with the goal that the lowest-possible-barriers-to-fulfillment are presented to the user.
2. Library users shall be given appropriate options for delivery format, method of delivery, and fulfillment type, including loan, copy, digital copy, and purchase.
3. Global access to sharable resources shall be encouraged through formal and informal networking agreements with the goal towards lowest-barrier-to-fulfillment.
4. Sharable resources shall include those held in cultural institutions of all sorts: libraries, archives, museums, and the expertise of those employed in such places.
5. Reference services are a vital component to resource sharing and delivery and shall be made readily accessible from any initial "can't supply this" response. No material that is findable should be totally unattainable.
6. Libraries should offer service at a fair price rather than refuse but should strive to achieve services that are not more expensive than commercial services, e.g. bookshops.
7. Library registration should be as easy as signing up for commercial web based services. Everyone can be a library user.

## Presentations and Publications 2007-2008

All Presentations can be downloaded from: <http://www.rethinkingresourcesharing.org/docs.html>

- “The Rethinking Resource Sharing Initiative and its Possible Implications in a European Context” by Poul Erlandsen, presented at the 5th Conference on Internet Document Delivery and Inter-library Cooperation, Bolzano, Italy, May 22, 2008.
- "Rethinking Resource Sharing", by Gina Persichini, presented at the Spokane Area Interlibrary Loan Interest Group Meeting, May 20, 2008.
- “New Trends in Resource Sharing and Document Delivery: the Rethinking Resource Sharing Initiative (in Danish)” by Poul Erlandsen, presented at the ILL Conference of the Danish Research Libraries Association, Denmark, May 28, 2008.
- "Rethinking Resource Sharing Initiative and Manifesto" presentation and break out session by Anne Beaubien, Michigan Library Association. Access, Collections and Technical Services Roundtable workshop, Lansing, MI, May 23, 2008.
- “Report on the Rethinking Resource Sharing Initiative” by Tanner Wray, presented at NELINET Annual Resource Sharing Conference, June 9, 2008.
- “ All Aboard the Wagon Train: Innovations in Resource Sharing”, by Anne Beaubien, presented at 39th Annual ILL Conference, Denver, CO, May 1-2, 2008.
- “Rethinking Resource Sharing: Bringing the Initiative to Maryland”, by Tanner Wray and Wendy Dobson, presented at the Maryland Library Association Conference, Ocean City, MD, May 15, 2008.
- “Rethinking Resource Sharing: An Update” by Gail Wanner, presented at ILL Day: Working in the Present, Looking to the Future, Newburgh, NY, March 17, 2008.
- “Rethinking Resource Sharing: Inspiring Librarians, Empowering Users” by Brenda Bailey-Hainer, presented at WILS Resource Sharing 2.0, March 13, 2008.
- “Throw Off Your Policies, Expose Your Holdings: The Rethinking Resource Sharing Initiative”, by Heather Clark, presented at the 2008 OCLC ILLiad International Meeting, Virginia Beach, VA, March 13, 2008.
- “Rethinking Resource Sharing: Inspiring Librarians, Empowering Users” by Brenda Bailey-Hainer, presented at OCLC Members Council meeting, Dublin, OH, February 11, 2008.
- “Rethinking Resource Sharing because it’s time...” by Colette Mak, presented at Indiana Library Federation Annual Conference, Indianapolis, IN, November 14, 2007
- “Rethinking Resource Sharing Initiative” co-authored by Pat Stevens and Anne Beaubien, presented by Pat Stevens at the 10th Inter-lending and Document Supply Conference, Singapore, October 31, 2007.

- “Get it: delivering information to users, when they need it, how they want it and where they want it” by Dan Iddings, presented at the 73rd IFLA General Conference, Durban, South Africa, August 2007.
- “Dare to Share: Rethinking Resource Sharing”, by Gail Wanner, presented at the SirsiDynix Superconference 2007, Colorado Springs, CO, February 2007.
- “Rethinking Resource Sharing: An Update”, by Gail Wanner, presented at the Annual Interlibrary Loan Conference, Colorado Springs, CO, April 27, 2007.
- “Rethinking Resource Sharing: Bringing the Initiative to Maryland”, by Tanner Wray, presented at the MAILL Meeting, July 19, 2007

### **Publications**

- Beaubien, Anne and Wanner, Gail. “The Rethinking Resource Sharing Initiative: a new development in the USA” *Inter-lending & Document Supply*. (Vol. 35 No 2) pp. 92-98 (summer 2007).
- Beaubien, Anne and Stevens, Pat. “Rethinking Resource Sharing Initiative” Resource Sharing & Information Networks Taylor & Francis, *Forthcoming*. September 2008. [It is the only peer-reviewed journal dedicated to resource sharing].
- Posner, Beth. "The Rethinking Resource Sharing Initiative: Rethinking Resource Sharing. Inspiring Libraries. Empowering People." *Interface*, Vol 30(1) Spring 2008.

## **Committee Work**

### **Steering Committee**

From January 2007 - June 2008, the Steering Committee consisted of a Chair, three At-large members, committee chairs, a project manager and sponsoring institution representatives. The work of this report reflects the members from this time period.

Beginning July 2008, the Steering Committee will follow the new governance structure. The Steering committee will consist of six base members (Chair, Chair-Elect, Past-Chair and three At-large members) and a project manager. The rest of the Committee is made up of ex-officio members to represent different types of libraries as well as liaisons from each committee, sponsoring organization and/or task force.

The Steering Committee's responsibilities include:

- Set the direction for the Initiative
- Schedule and plan the forums with the Forum Task Force

- Coordinate communications with and between the working groups and external organizations
- Maintain liaison relationships with organizations such as IFLA, ASCLA ICAN, and RUSA STARS
- Track the work of the committees
- Regularly evaluate the charge of the committees/task forces in light of the RSSI's charter
- Provide annual reports on activities, including goals and tasks planned and accomplished.
- Establish new committees/task forces as need for them is identified
- Inform Sponsoring organizations of the RSSI's key activities

## Accomplishments

### **2007 Forum**

The 2007 Rethinking Resource Sharing Forum was held in Chicago on April 19-20, 2007.

The forum included many breakout sessions where community support was expanded and the Delivery Committee was created.

Speakers included:

- Michael Stephens, Dominican University and blogger for [Tame the Web: Libraries and Technology](#).
- Linda Frueh, Washington, D.C. Regional Director, [Internet Archive](#)
- Alexis Rossi, Project Leader Internet Archive

Full agenda and presentations are available at: <http://rethinkingresourcesharing.org/forum07/>

## Steering Committee Members

January 2007-June 2008

### **Brenda Bailey-Hainer, Chair**

President and CEO, BCR

### **Anne Beaubien**

Director, Cooperative Access Services and Grants Officer, University of Michigan Library

### **Poul Erlandsen**

Head of Document Access Services & Collection Management  
National Library of Education, Denmark

### **Beth Posner**

Head of Interlibrary Loan Services,  
Mina Rees Library, CUNY Graduate Center

### **Gina Persichini**

Networking Consultant, Idaho Commission  
for Libraries

### **Barbara Preece**

Executive Director, Boston Library  
Consortium

### **Gail Wanner**

URSA Product Manager, SirsiDynix

### **Sherry Willhite**

Request Project Manager, CDL  
Bibliographic Services, California Digital  
Library

### **Karen Wetzel**

Standards Program Manager, NISO

### **Tanner Wray**

Director of Public Services, University of  
Maryland Libraries

### **Victoria Miller,**

Project Manager

### **RRS Innovation Award**

The RRSI was started to advocate for a complete rethink of the way libraries conduct resource sharing in the context of the global Internet revolution. In order to showcase resource-sharing innovation, the RRSI created an award to encourage libraries and librarians to make changes in how they do resource sharing and improve service to users.

In June 2008, two winning institutions were awarded with a cash prize of \$1000 each. Recipients were announced via a press release on June 11 and formally presented at the ALA RUSA STARS “Throw off your policies and expose your resources: Rethinking resource sharing ALA Pre-conference” on June 27 in Anaheim CA. The winners were also invited to present at the IFLA satellite pre-conference, “Rethinking Access to Information: Evolving Perspective on Information Content Delivery” in Boston in August 2008. Funding for the 2008 Innovation Awards was provided by the Alliance of Library Service Networks.

The 2008 Innovation Award Winners were:

- [North Carolina Libraries for Virtual Education](#) (NC LIVE)’s program to stream video files to member library users wherever they are on the web.
- New York Reference and Research Resources Councils (NY3Rs) – [the IDS Project – Information Delivery Services Project](#)

### **ALA Annual 2008 Pre-Conference**

June 27, 2008

RUSA STARS offered this session, “Throw Off Your Policies and Expose Your Resources: Rethinking Resource Sharing” to help library administrators and ILL librarians discover innovative ways to create the future of library resource sharing. The pre-conference day was designed to give librarians an opportunity to develop creative responses to the changing expectations of library users and ideas about ways to improve service to patrons. 105 people attended the pre-conference and post conference evaluations were extremely positive. Nine people filled out an “Inspiration Follow- Up” form that described what they planned to do when they got home to rethink resource sharing and asked to be contacted in six months to see how they were doing.

The Pre-conference Agenda is available at: <http://rethinkingresourcesharing.org/preconf08>

## **IFLA Satellite Meeting**

Scheduled August 5-7, 2008

The RRSI, was involved in the preparation and planning for the IFLA Satellite Meeting, “Rethinking Access to Information: Evolving Perspectives on Information Content and Delivery” which is jointly organized by the following IFLA Sections:

- Document Delivery and Resource Sharing
- Acquisition and Collection Development
- Reference and Information Services

*“Libraries need to stop looking at designing processes and systems to suit librarians – they need to adapt and modify their processes and systems to suit the user. This new paradigm thus STARTS with the user, and not the other way around.”*

**Kim Baker, Chair of the IFLA Document Delivery & Resource Sharing Standing Committee**

This IFLA Satellite Meeting will be held August 5-7 in Boston at the Boston Public Library. It will offer a unique opportunity for delegates from the US, Canada and countries around the Globe to come together and learn about innovative ideas and how libraries are rethinking their services.

The Agenda is available at: <http://www.bcr.org/rethinkingaccess/>

## **Additional Committees**

Committees define and carry out the specific activities of the RRSI. The chair of each group serves as an ex-officio member of the Steering Committee. Initially there are the groups listed below; others may be established as the work of the initiative progresses and a need for a new group is recognized.

### **Committees:**

#### **STARS Rethinking Resource Sharing Policies (ALA).**

*Chair – Gina Persichini (Networking Consultant, Idaho Commission for Libraries)*

The goal of the Policies Committee is to develop a policy framework for an expanded resource sharing ideal that addresses services offered and how those services are offered to users. In the 2007-2008 reporting period, the Policies Committee focused on exposing the Manifesto through seeking it's approval to encouraging its message.

## **Specific Accomplishments**

- Created a Facilitators Guide for discussing the Manifesto so groups of librarians could have a guided method for discussing the seven principles. The Facilitators Guide was posted online with the *Manifesto* and shared via various electronic mailing lists.
- Finalized the *Manifesto* for Rethinking Resource Sharing and shared it publicly via RRS website and various mailing lists.
- The *Manifesto* for Rethinking Resource Sharing was affirmed by the following organizations:
  - ▶ ALA RUSA STARS Executive Committee (January 2007)
  - ▶ ALA RUSA STARS Rethinking Resource Sharing Policies Committee (January 2007)
  - ▶ Rethinking Resource Sharing Steering Committee (February 2007)
  - ▶ IFLA Document Delivery and Resource Sharing Standing Committee (May 2007)
  - ▶ Maryland Interlibrary Loan, MAILL (October 2007)

## **Interoperability Committee**

*Chair- Gail Wanner (URSA Product Manager, SirsiDynix)*

The Interoperability Committee identifies the technology framework that makes it possible for users to obtain what they find inside the library or outside on the open Web. In this reporting period, the committee tackled several issues. First, they completed the prototype of the GoGetter (formerly Get-It!) plug-in. This code is a plug-in for the Firefox browser and was slated to be released under an open source license. As of July 2008, it is still pending complete license requirements and will be release via OCLC as soon as all legal issues are complete.

They also began work on a visual "landscape" of current interoperability for resource sharing, including an assessment of usage and potential success for various standard and proprietary methods of interoperation. This will be accompanied by a series of scenarios that provide details on specific types of requests and methods of fulfillment. The primary goal of the landscapes is to identify gaps or weaknesses that need attention from standards bodies or other groups. This will be an ongoing project in 2008-2009.

### **Marketing Committee**

*Chair- Beth Posner, Head of Interlibrary Loan Services, Mina Rees Library, CUNY Graduate Center*

The Marketing Committee coordinates outreach and publicity activities for the Initiative. In this reporting period, they focused on branding and messaging for the Initiative.

### **Specific Accomplishments**

- Worked with presenters to create a consistent presentation template
- Created a name and branding of the Get-It! Prototype = GoGetter
- Created an RRS logo design (for use on the RRS website and anywhere else people want to incorporate it!)
- Designed stickers for distribution at library meetings and outreach

### **Delivery Committee**

*Chair- Melissa Stockton, Quipu Group*

The Delivery Committee creates an international brand for home delivery that could be used for libraries anywhere who want to experiment with home delivery, possibly called YourLibrary@Home. They also explore the potential of connecting existing library couriers that do library-to-library deliveries on set routes into larger regional, national or international linked systems.

This Committee was created during the Forum III in Chicago. Meliissa Stockton accepted the Chair position in June 2008. There will be much activity in the next year.

### **User Needs Committee.**

*Chair, Vacant*

This committee conducts research on user behavior for the purpose of defining user needs in the areas of information access and resource sharing. The chair is currently vacant.