

**Texas Resource Sharing:
Examining the Present, Envisioning a
Vibrant Future**

Introduction and Executive Summary

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Introduction

The interlibrary loan environment in Texas is a complex tapestry of many interwoven programs. All of the Texas State Library and Archives Commission (TSLAC) resource sharing programs – TexNet Centers, the Texas Group, the Project Loan program, the TexShare ILL Protocol, the Library of Texas, and any relevant state legislation and rules – are deeply intertwined, and it is difficult to examine any single piece of the system in isolation. In addition, the overall texture of Texas resource sharing is influenced by many factors outside of the control of any one agency or organization. At any single institution, the level of Internet connectivity, the variety of ILS in use, the access of librarians and patrons to discovery tools for identifying materials, the databases licensed, the options available, the local financial incentives or disincentives, and the marketing efforts all factor into the overall strength of the resource sharing fabric.

In an effort to better understand these factors in relation to the broader environment of innovation in library services, the Texas State Library and Archives Commission (TSLAC) contracted with the Bibliographical Center for Research (BCR) to conduct a thorough analysis of interlibrary loan and resource sharing services in Texas. The purpose of the research as stated by TSLAC in the RFP was:

“... to review the structure and design of Texas statewide Interlibrary Loan services through an unbiased study of the program. A plan is needed for the interlibrary services to meet the challenges of a changing environment. An interlibrary loan study will:

1. Examine options for meeting interlibrary loan needs in terms of costs and benefits.
2. Provide a blueprint, based on best practices, for building interlibrary loan services at the state level into the future.
3. Determine the needs of the Texas interlibrary loan community as they strive to meet patron demands for library materials.
4. Collect accurate information on the attitudes and perceptions of Texas librarians and library patrons toward various methods of interlibrary loan delivery.”

The contract called for creating an Interim Report in September 2007, followed by a Final Report in December 2007. The Final Report encompasses all work to date, including research submitted as part of the required Interim Report, additional background research, a feasibility analysis of potential solutions, and recommendations for action. The Final Report replaces the Interim Report in its entirety.

The research study was limited by two primary factors: time and available funding. Because of required deadlines for expenditure of monies used to fund the research, an Interim Report was due following approximately two months of background research. The Final Report, which contains the bulk of the analysis, was due two and a half months later. Extended timelines would have allowed for more patron interviews and surveys throughout the year. In addition, the research team would have been able to organize and schedule focus group discussions on resource sharing as well as one-on-one conversations with key stakeholders. Consequently, the team was limited to responses by telephone and email. Available funding also limited the scope of the patron and staff surveys. Targeting additional libraries with portable electronic survey devices would have provided responses from a more geographically dispersed range of library users who do not currently use interlibrary loan services. Such distribution of portable electronic surveys carries a cost, but would result in more feedback from a group of constituents which are often difficult to reach.

An Executive Summary has been provided to highlight the primary recommendations for improvements to Texas resource sharing. These recommendations have been summarized from other sections within the overall Final Report.

Part 1 includes the background information gathered through various methods during all phases of the research.

Part 2 includes descriptions of potential resource sharing models, including an overview of estimated costs, benefits, and a feasibility rating.

The primary set of recommendations is located in Part 3. The recommendations focus on overall goals to be established for statewide resource sharing service as well as to a specific plan of action for implementing new resource sharing models.

It is clear that if the current funding restrictions in Texas persist (i.e. no significant increase in LSTA funding and no increased funding support from the state legislature) while at the same time the volume of interlibrary loan requests continues to increase each year, TSLAC will be unable to continue to support the current model which funds interlibrary loan service for a significant number of public libraries in the state. The BCR research team hopes that the recommendations contained in this Final Report will assist TSLAC in turning this conundrum into an opportunity for improving resource sharing to all Texans.

Executive Summary

Goals for a Statewide Resource Sharing Service

The BCR research team conducted a review of the resource sharing literature and best practices and protocols. Both patrons and library staff were surveyed regarding their needs and desires related to interlibrary loan service. The results of these reviews and surveys were used to create goals for a Texas statewide resource sharing service which are as follows:

- Patron-centered
- Unmediated requesting
- Maximized use of technology
- Enhanced reciprocity and increased visibility of library holdings
- Flexibility for ongoing change in technology and patron expectations
- Shared funding responsibility at local, state, and federal levels
- Resource sharing viewed as a core service
- Increased training and continuing education for library staff
- Efficient and cost effective delivery of materials

Workflow Improvements to TexNet Centers

A detailed workflow analysis of the TexNet Centers was conducted through site interviews, phone interviews and a time-cost study. The results were used to create recommendations for short term process improvements to enhance efficiency and consistency at TexNet Centers.

- Customize ILLiad and Clio implementations at TexNet Centers to the same levels of automation
- Troubleshoot and improve ILLiad response time between TSLAC and TexNet Centers
- Require use of branch collections to fill Area Library requests
- Develop and implement method of managing all correctional facility requests electronically
- Increase courier participation statewide and reduce packaging requirements
- Develop on-going training program at TSLAC for TexNet Center staff

Transition to New Resource Sharing Model

While short term improvements to the current practices are achievable, long term viability of the overall TexNet Center model is questionable. Traffic through the system has been increasing steadily and improvements in service to patrons will naturally result in even higher demand. State subsidized funding of staff to

provide interlibrary loan support for host libraries is not financially viable over the long term.

The most cost effective method of delivering resource sharing services to patrons within a state is to develop the skills of staff at local libraries, to distribute the workload among all libraries, to provide an easy-to-use centralized software solution, and to support resource sharing with a robust delivery service.

Moving from the current TexNet Center interlibrary loan model to a new resource sharing solution will be painful for libraries heavily invested in TexNet Centers. However, in the long term overall service to Texans will be improved and the skills of library staff developed to a higher level. The transition should be phased in with the major steps outlined below.

- Reduce the number of TexNet Centers from nine to one to achieve economy of scale in current model
- Simultaneously implement one or more pilots to test new resource sharing models
- Issue RFP for a new resource sharing model with specifications based on results of pilots
- Use cost savings gained from reduction of TexNet Centers to transition to a new resource sharing model identified from results of pilot projects