Wagging the Long Tail
Sharing More of Less

Recommendations for Enhancing Resource Sharing in Indiana

White Paper developed by the Indiana Resource Sharing Task Force[1]
January 2007

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[1] The Resource Sharing Task Force was comprised of high-volume borrowing and lending representatives from ALI, PALNI, INCOLSA, Medical and Public libraries, and the Indiana State Library. The task force was convened and led by INCOLSA. The members of the task force are included in Appendix D.

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Executive Summary

> "Many of our assumptions…are actually artifacts of poor supply-and-demand matching - a market response to inefficient distribution."[3]
> Chris Anderson "The Long Tail"

The natural diversity of library collections creates the situation wherein, while no single library can supply all the information needs of its users, collectively we can.   In "The Long Tail," [4] Chris Anderson describes the phenomena of the internet marketplace where the "80/20" rule makes the "80" a commercially viable market and coins the phrase "selling more of less" as consumers discover and purchase materials in the long tail.   Libraries, with the breadth and depth of our collections, ARE the long tail; working cooperatively, we have both the front list and Anderson's "long tail."   We make that long tail available to the larger citizenry through resource sharing.

This white paper proposes the Indiana library community embrace this opportunity by:
- Supporting resource sharing as a core service, not a peripheral nicety observed by only the largest organizations; and
- Duplicating the customer-service expectations established by Netflix and Amazon—3-5 day delivery to the end-user.

Last year resource sharing provided Indiana libraries with access to over 30 million dollars of materials for a fraction of the cost. The average cost to add a title to the collection exceeds $100[5]. At a national average of $16 to borrow, every resource sharing transaction serves the users need and avoids over $85[6] in expense. The cost avoidance is even stronger for article requests from journals

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[3] Chris Anderson, "The Long Tail," *Wired* 12.10 (October 2004): 172. http://www.wired.com/wired/archive/12.10/tail.html.

[4] *Ibid.*

[5] Based on average price per book/serial in subject range as reported in the *Bowker Annual*, 51st edition, and $16.25 average copy cataloging cost. Additional costs include the cost of selection, acquisition, physical processing and warehousing the title post acquisition.

[6]   Based on an estimated cost of $16 to borrow. See Saul J. Amdursky, "ILL: Sacred Cow or Vital Service?," *Library Journal* (June 1, 2003) citing Mary E. Jackson, *Measuring the Performance of Interlibrary Loan Operations in North American Research and College Libraries* (Washington, D.C.: Association of Research Libraries, 1998). http://www.libraryjournal.com/article/CA300100.html.

where the cost of even a few subscriptions can exceed the price of a car[7]. The financial case is clear—resource sharing is not a peripheral service, it is a fiscally responsible means of meeting the user's needs for materials where:

- The library failed to anticipate demand
- Materials were deemed out-of-scope for the collection
- Anticipated use was too low to justify the expense of acquisition

While no library can acquire or license all the content its users need, all libraries have at least some unique or rarely held items. By making collections available through resource sharing, libraries increase the universe of content for everyone. Indiana's 800 libraries[8] (representing 2,200 distinct buildings and collections) hold well over 28 million titles, including a minimum of 500,000 unique titles[9]. This represents a significant investment by local and state communities in these collections. Resource sharing makes that wealth of materials available to the citizens of Indiana. Resource sharing by Indiana libraries through OCLC's Resource Sharing system exceeds 360,000 transactions annually at a system cost of $558,716[10].

Indiana has a state-wide catalog (INCat), a state-wide delivery system (Wheels), and nearly all major libraries use the OCLC ILL system to connect to major libraries in Indiana and throughout the United States. We have a strong foundation, but Indiana is not leveraging these tools or our collections as effectively as possible. This white paper issues a call to Indiana to build on this foundation to continue to move state-wide resource sharing forward through a defined set of:

- Principles
- Minimum standards
- Best practices

When considering resource sharing, the service should be considered as the continuum from discovery to delivery--beginning and ending with the user. It is our hope that these principles, standards, and best practices be endorsed and adopted by Indiana library community to ensure timely, cost-effective resource sharing within Indiana. It is time to embrace resource sharing as the powerful service it is, leveraging our collective holdings to meet users' needs and allowing libraries to make the best use of materials' budgets. It's time to wag the long tail.

This white paper should be the foundation of an ongoing discussion. To ensure continued improvement, the minimum standards and best practices should be reviewed annually. Over time the current best practices should become minimum standards and be replaced with new best practices as supported by new technologies, standards, and Indiana's philosophy of service.

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[7] ILL data analysis in support of this white paper showed that the price of 6 of the highest use journals exceeded $24,000 per year. These six journals were used 444 times for ILL during the sample period.

[8] INCOLSA Facts. http://www.incolsa.net/inside/incolsafacts.html.

[9] Based on WorldCat holdings. This represents the collections of 200 Indiana libraries. Because the Indiana rooms are not well represented in WorldCat ,the 500,000 number of holdings and unique holdings is a minimum number.

[10] Cost for WorldCat Resource Sharing; does not include cost for add-ons such as ILLiad or Ariel, or access fees.

Background

> "With expanded access and collaboration among libraries and other information providers, library patrons have raised their expectations. In 1997 they want "one-stop shopping"--full-text information delivery with a few keystrokes to their desks."
> "Appendix D." *Indiana Library Resource Sharing Manual*, 1997.

What was true in 1997 is even truer today. Today's service level expectations are set by internet-based commerce—Amazon and Netflix. The standard for turnaround is 3-5 days (Monday-Saturday). Indiana's libraries' "click and brick" distribution chain is well positioned to operate effectively in this environment.   INCat allows libraries and users to search the aggregated collections of over 200 Indiana libraries. INCat is a highly scalable platform that can support both traditional interlibrary loan and "remote circulation" allowing resource sharing to be conducted as both interlibrary loan and circulation.   Pricing for Wheels, the state-wide delivery service, is based on the number of stops, not the number or weight of the items carried, thus providing delivery at no incremental costs for increased volume. INSPIRE provides immediate access to full text for hundreds of journals and a shared collection of electronic books.

There are four major components to the process:
- Discover
- Locate
- Request
- Deliver

Over the last year Indiana has enjoyed improvements to all four components, beginning with Indiana's state-wide FirstSearch WorldCat subscription.

Discover: Through WorldCat all Indiana libraries gained real-time access to the aggregated collections of over 23,000 libraries worldwide.

Locate: INCat gave users the ability to narrow their search not just to Indiana, but to all libraries in a particular region of the state or to particular types of libraries throughout the state.   Indiana University, Indiana's largest collection, had been represented in WorldCat as "IUL" with all campuses aggregated under that one identity.   As part of Indiana's WorldCat project, IU completed a "symbol flip" allowing each of their campuses to be seen as individual libraries.   Ivy Tech also completed a symbol flip breaking out all 27 campuses. New libraries, such as West Lafayette and Huntington Public, have begun contributing their holdings to WorldCat, making their collections easily discovered.

WorldCat and INCat have provided vast improvements in Discovery and Locate. Indiana's use of this service has grown by 23% in one year.

Request and Deliver: The ALI Direct Request Pilot demonstrated that allowing users to discover and request on their own, combined with a commitment to service level agreements among partners and 5-day per week Wheels service, brings delivery to the Amazon standard of 3-5 days.

These improvements are a beginning. We are poised to build on this foundation to move Indiana forward.   The task force was formed by INCOLSA with participants solicited from all types and sizes of libraries. Members included directors and resource-sharing staff to ensure that this white paper would advance a service philosophy easily endorsed by management and would reflect a practical and swiftly implemented approach. The task force looked at the borrowing and lending environment and current resource sharing practices. Further, the task force brainstormed models of excellence for Indiana resource sharing.

Environment[11]

> "Interlibrary loan started as an occasional privilege, but it is rapidly becoming a necessity and even a right."[12]
> Richard DeGennaro, 1980

Like all states, Indiana libraries use a variety of automation systems to meet the needs of users. Libraries with shared local systems, such as Indiana University and the Indiana Shared Library Catalog (ISLC), use "remote circulation" heavily. Reciprocal arrangements between libraries allow users of one library to have circulation privileges of the partner library. The Reciprocal Borrowing Program of the Academic Libraries of Indiana exemplifies this. The Public Library Access Card (PLAC) allows citizens in underserved areas to pay for library services in another community.

Remote circulation is a highly efficient resource sharing model used in states such as Illinois and Ohio (Ohiolink). Traditional interlibrary loan is conducted on the two national utilities—OCLC and DOCLINE[13]. Indiana has 125 active resource sharing libraries, with the INCOLSA I*Ask service managing ILL for another 300 libraries who opt to outsource resource sharing due to cost efficiency or whose need has been so low as to make developing local expertise impractical.

Indiana is a net borrower, requesting 30% more than it lends, with a high reliance on out-of-state resources to meet the information needs of its citizens. Indiana borrows 40% of its materials from beyond its borders. This increases costs because materials cannot be delivered through Wheels and may incur library-to-library charges.

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[11] Environmental scan results based on analysis of the top 20 borrowing and lending symbols for OCLC WorldCat Resource Sharing during the most recent ILL peak months (Oct-Nov 2005 and Feb-April 2006).   These 29 total symbols represented 95% of the borrowing and 80% of the lending activity during the sample months. OCLC's ILL system is the default national utility for interlibrary loan and is the dominant system in research, academic, and medium to large public libraries.   This analysis does not include circulation through shared local systems such as the IU, Ivy Tech, or ISLC systems.   This analysis does not include ILL activity placed through DOCLINE.

[12] Richard DeGennaro, "Resource Sharing in a Network Environment," *Library Journal* 105:3 (February 1, 1980): 353-5.

[13] DOCLINE is run and supported by the National Library of Medicine. It is a closed system available to health science libraries. Indiana statistics are not available for DOCLINE activity. DOCLINE activity is almost exclusively for article requests.

Our state's resource sharing manual was last updated in 1997 and does not reflect the current ALA ILL Code, which itself is in revision. While over 200 libraries actively contribute their holdings to INCat, many more libraries do not. In today's environment, if something is not discoverable through the internet, it is as if it doesn't exist. While this is true for popular titles, it is even truer for the treasures held in Indiana local history collections across the state.

Libraries cite a number of barriers to embracing and promoting resource sharing. These include:

- **Costs**: Libraries have real staff and system costs associated with automating resource sharing. Some libraries perceive resource sharing as spending money to serve everyone in the state other than their own users.
- **Staff**: Active participation in resource sharing requires that staff to be trained and assigned to this function.
- **Local control**: Some libraries fear that opening their collections to resource sharing as lenders means their own patrons will have diminished access.
- **Uniform collections**: Some libraries believe that the collections of libraries their size is so homogenous that none of them have anything to contribute—all of their titles are widely held.
- **Technology and training**: Active participation in resource sharing requires an ongoing commitment to acquiring, supporting, and maintaining additional technology and training staff to use these systems.

To plan for the future it is helpful to understand the present. As part of its work, the Resource Sharing Task Force analyzed current resource sharing patterns based on a sample of WorldCat Resource Sharing data. A detailed analysis of the sample is included as Appendix B.

Academic and public libraries are driving resource sharing. The 29 public and academic libraries studied created over 90% of the resource sharing activity during the sample months. Academics have a higher need for journal materials, while publics borrow more books. Academics borrow more materials from out-of-state than publics. Both academics and publics borrow English language materials almost exclusively.

While much of resource sharing takes place academic-to-academic or public-to-public, libraries are interdependent both within Indiana and beyond our borders. Based on the low repeat use of journals (a median of 2), resource sharing in Indiana is being used appropriately to supplement the home library's core collection. Indiana libraries are not using resource sharing to substitute for collection development.

The highest demand for materials is in the areas of:
- Literature/Fiction
- Medicine
- Social Sciences
- Philosophy/Religion
- Science

Resource Sharing Principles for Indiana

Resource sharing is the library cooperative in action and as a mission-critical service whose success depends on that cooperative this function should be guided by shared values and shared principles. First among those values and principles is that resource sharing is a core service.

- Interlibrary loan is a core library service
  - As a core service, ILL should be promoted at the U.S. regional, state, and local level
  - Increased interlibrary loan is desirable
    - Indicates a high level of library service
    - Allows libraries to use their materials budgets effectively
    - Provides access to uniquely held items in the state
- Delivery is a critical component of effective resource sharing
  - Delivery should mirror Amazon experience (3-5 days)
- Libraries should contribute to and maintain their holdings in INCat
- Libraries should contribute to and maintain their serials holding statements in INCat
- Libraries should be prepared to lend all formats they borrow
- Indiana libraries should have more generous lending policies within Indiana than they do for out-of-state libraries
- Indiana libraries should all have the tools and training necessary to participate in resource sharing at a level appropriate to their library (no library left behind)
- Indiana libraries should negotiate licenses that allow ILL with E-delivery on electronic journals
- Libraries should be prepared to accept some small, but inevitable, loss and damage costs as the cost of doing business in exchange for the benefits they receive from borrowing
- Traditional ILL is library-to-library, but we need to prepare for end-user delivery

Recommendations

"We owe it to our patrons to meet this demand, and to meet it graciously with devices that emphasize our willingness to serve."[14]

William Potter, 1986

Since resource sharing is a core library service and should be promoted at regional, state and local levels, the task force recommends the following:

Adoption and endorsement:
- Indiana's Resource Sharing Manual be revised based on the principles and standards outlined in this paper and the American Library Association ILL Code
- Indiana State Library's certification program be expanded to include adherence to the minimum standards
- Library consortia and alliances in Indiana work together to implement "proof of concept" programs demonstrating the best practices and principles

State Catalog of Library Holdings: If INCat is not inclusive, it is exclusive. We recommend that the Indiana library community set the goal of 100% inclusion by the end of 2008. To meet that goal we recommend the following:
- Grants for smaller libraries to load and maintain their local collections in the state catalog
- Funding included in INSPIRE (state databases & state catalog)
- Small libraries "piggyback" on county/academic library accounts
- Benefits of inclusion outlined at Director/Library Board Meetings across state

Delivery: At the regional, state and local levels delivery for both physical and electronic formats should be enhanced:

Electronically:
- Odyssey or Ariel – encourage local libraries to adopt electronic fulfillment
- Divide state into sections – large libraries adopt smaller libraries and provide training and support – hands on set-up and support

Physically:
- Wheels delivery – encourage local libraries to increase delivery days
- Minimum number of delivery/pick-up days - investigate grants, state support, larger library support

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[14] William Potter, "Creative Automation Boosts ILL Rates," *American Libraries* 17:4 (April 1986): 244-246.

Distribution of requests: The Indiana library community should develop and adopt a philosophy of service to form the basis of an equitable distribution of requests (load leveling).

Access to health sciences materials: Find some means to allow the premier health science collection in the state, Indiana University Medical, to provide no-charge ILL within Indiana.

Regional Sharing Contracts:
- Work with contiguous states for "preferred partners"
- Establish service level agreements for preferred partner states
- Investigate linking Wheels service across state lines
- Investigate a Regional Catalog
    - extract collections of "preferred partners" and maintain a link on INCat

Minimum Standards and Best Practices
for Interlibrary Loan Operations in Indiana Libraries

Interlibrary loan (ILL) or resource sharing activities play a vital role in leveraging access to and use of library materials within the state of Indiana. The Indiana Resource Sharing Task Force advocates the following minimum standards and best practices in all Indiana libraries. The purpose of these recommendations is to facilitate:

- Ease in identifying the libraries that hold specific titles
- Ease and efficiency in sending requests to holding libraries
- Ease and efficiency in delivering the requested materials
    - electronic delivery/receipt of articles/chapters
    - rapid delivery of physical items (e.g., books, DVDs)

Following these minimum standards uniformly across the state will position Indiana libraries to
   (1) meet patrons' information needs quickly, and
   (2) take advantage of opportunities for streamlining our resource sharing activities, leading to better patron service and to cost-effective management of resource sharing activities.

While many Indiana ILL operations already meet all or most of these recommended minimum standards and best practices, some libraries may need assistance or resources to meet these goals.

Minimum Standards

To work effectively resource sharing must be accepted as a core service with staff time committed to effective service. The following standards are the minimum that every library should be prepared to perform.

Borrowing

- **Promote resource sharing**. Resource sharing is a core service. Availability of this service should be posted on the library's web site, at the reference desk, and on the library's OPAC.

- **Process requests quickly**. Borrowing requests should be placed within one business day of receipt from the patron.

- **Verify requests using WorldCat**. Through an LSTA grant Indiana libraries have unlimited access to WorldCat through FirstSearch. WorldCat is available on INSPIRE, and every Indiana library is eligible for its own FirstSearch WorldCat account.

- **Automate requests**. Interlibrary loan requests should be placed using an automated system such as OCLC, ILLiad lending pages, or DOCLINE. If paper is the only option, requests should be sent via fax on an American Library Association (ALA) approved form.

- **Request freely**. Resource sharing is a core service; just as end users are not charged for circulation or asking a reference question, end users should not be expected to pay for this service. If necessary, libraries should only charge their patrons to recoup any lending library charges.

- **Use INSPIRE**. Article requests should be checked against INSPIRE before placing a request.

- **Comply with copyright law**. (US Code: Title 17 and CONTU Guidelines)

Lending

- **Participate**. Resource sharing is a core service that depends on every library to participate. A library that borrows from other Indiana libraries should be prepared to lend its own available materials when asked.

- **Respond quickly**. Automated systems should be checked a minimum of once daily and responded to within two business days. Requests should never be allowed to "age" to the next lender.

- **Provide adequate loan periods**. Loan periods should accommodate transit time <u>and</u> use periods.

- **Lend freely**. Publicly funded public, school, academic and non-profits should lend freely to each other within the state. Privately funded and corporate libraries are encouraged to participate as fully as possible.

All Libraries

- **Respond quickly**. Libraries should strive for a 1-2 business day turn around time for the majority of their transactions. This includes sending copies electronically, preparing materials for shipping, and responding if unable to fill requests.

- **Use Wheels**.   Every Indiana library involved in interlibrary loan should contract for either three (MWF) or five days of Wheels service to move material rapidly around the state.

- **Lend all formats**. Make every effort to lend as many items in non-traditional formats as possible (e.g., audio-visual items, maps). Make exceptions, whenever possible, for Indiana partners for items not usually lent (e.g., single periodical issues, reference titles).

- **Use document delivery software**.   Any library that supplies or requests photocopies should use automated software to send and receive. If your library does not already have software, use Odyssey[15].

- **Protect materials during transit**. Package materials to protect them during transit.

- **Maintain policy and contact information**. If your automated system supports it, record and maintain current policy and contact information.

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[15] Available as a no-charge download from Atlas Systems. http://www.atlas-sys.com.

Best Practices

Best Practices should never be considered "done." While these are today's best practices, over time best practices should move from "best" to "minimum," while new best practices are identified.

- **Interlibrary Loan management software**. Use ILL management software that automates many processes, e.g., WorldCat Resource Sharing, ILLiad.

- **Process borrowing and lending requests daily**.
    - Systems should be checked daily for new requests.
    - If your system supports this feature, use "reasons for no when unable to fill a request."

- **Shipping returnables (books)**. Returnable items should be delivered to the carrier within one business day of their preparation by ILL staff.

- **Document Delivery Software**. Install and make electronic document delivery software available at your library. If your library does not already have software, adopt Odyssey as the standard. This increases efficiencies for high volume lenders reducing turn around time for everyone.

- **End-user convenient**. Provide an online interlibrary loan form on your OPAC and library's home page. Provide resource sharing at no charge to your users.

- **Update catalogs/INCat**. Contribute and maintain your library's current and retrospective holdings to the Indiana Catalog. As items are declared lost, declared missing, and/or withdrawn, update INCat as well as the local catalog. (minimum: semi-annual)

- **Staffing**. Library administrators should plan and budget for the staffing resources necessary to meet these standards (ILL staff and IT support, as needed).

- **Training**. Budget to allow resource sharing staff to be current on use of their systems. This includes bringing new and current staff up-to-date on their system of choice and supporting ongoing training to keep the skill set fresh.

- **Serials holdings**. Libraries should commit to (1) load at least 75% of all serials' holdings into INCat so that partners can see holdings to the volume/issue level and (2) update serials holdings in INCat periodically (minimum: semi-annual).

- **Electronic journals and resource sharing**. Negotiate as many licenses as possible that permit the resource sharing use of material from electronic titles and that also permit electronic delivery of those items.

- **Packing returnables**. Material will be sent via the courier with sufficient cushioning material (e.g., used jiffy bags) to protect it from normal wear and tear during transportation and delivery. Fragile or especially valuable material will receive special packaging attention

and/or will be shipped individually via another carrier if necessary to protect it and/or cover insurance requirements.

- **National and Indiana Interlibrary Loan Codes**. Follow the most recent editions of the national interlibrary loan code and/or Indiana Resource Sharing Manual for accepted practices as a borrower and as a lender.

- **Copyright**. When the fair use provisions for a given title have been used, consider paying royalty fees in order to continue to provide service.

- **Maintain statistics**. Interlibrary loan data should be maintained and periodically compiled and analyzed to demonstrate that resource sharing is not a substitute for adequate local collections. Interlibrary loan data should be used in conjunction with the collection development process

Appendix A: Definitions and Links

American Library Association: The national profession for American libraries of all types.
URL: http://www.ala.org

ALI: Academic Libraries of Indiana. Consortia of Indiana academic libraries.
URL: http://ali.bsu.edu/

Ariel: Software offered by Infotrieve that supports transmitting scanned articles as TIF files to other libraries over the internet. The software at the other end accepts the document and changes it to PDF for easy delivery to the user. Ariel was the dominate document delivery system prior to the introduction of Odyssey and still retains a very large user base. Ariel is available for a fee and is a closed system. Ariel cannot receive documents from any system other than Ariel.
URL: http://www4.infotrieve.com/products_services/ariel.asp

Copyright: Copyright is set of laws governing use of intellectual property. In the United States this is covered by US Code Title 17 and by the CONTU Guidelines that define circumstances under which some amount of copying is allowed under "fair use" for the purposes of education. Public and Academic use of photocopying from protected materials may be covered by fair use. Copying by for-profit organizations is never covered by fair use.
URL: http://www.copyright.gov/title17/

Copyright Compliance Center (CCC): The Copyright Compliance Center manages copyright for many publishers allowing libraries to find out the royalties for use and to manage royalty payments. The CCC is supported by a percentage of the royalty payments it collects.
URL: http://www.copyright.com/

CONTU Guidelines: The CONTU Guidelines outline the amount of copying that is generally accepted to fall under the "fair use" provisions of the copyright law.
URL: http://www.copyright.gov/circs/circ21.pdf

DOCLINE: DOCLINE is an interlibrary system developed by the National Library of Medicine (NLM). Health science libraries use DOCLINE to transmit interlibrary lend requests to each other. DOCLINE is supported by Federal dollars and is offered at no additional fee.
URL: http://www.nlm.nih.gov/docline/

Document Delivery: A library service that provides delivery of library materials, generally articles, to the office, desk top, or home of the library user.

Document Supplier: Document Suppliers provide copies of articles for a fee and will pay associated royalty for the requesting library. The major Document Suppliers used by Indiana libraries are the British Library's Document Supply Center and the National Library of Canada's CISTI service.

I*Ask: Indiana's statewide interlibrary loan outsourcing solution and back-up reference support. The service is an outsourcing option for more than 300 libraries that lack funding, staffing, or resource sharing infrastructure to provide full interlibrary loan or back-up reference on their own. I*Ask centers provide a distributed statewide method to borrow and lend materials and share resources. Staff at I*Ask center host libraries have access to databases and collections not available statewide on INSPIRE or at the I*Ask libraries.

ILLiad: ILLiad is an interlibrary loan productivity application that manages a wide variety of interlibrary loan tasks such as statistics, end user tracking, billing, copyright and royalty payments and document delivery. ILLiad is used by over 700 large libraries nationally and by 29 libraries in Indiana as of January 2007.
URL: http://www.oclc.org/illiad/default.htm

INCat: Indiana's state-wide library catalog aggregating the collections of over 200 Indiana libraries. INCat is built on WorldCat holdings and was chosen because it is a proven, scalable platform and because all major academics and most major public libraries in Indiana use OCLC for cataloging, thus allowing INCat to be maintained through the existing, routine cataloging activities of these libraries.
URL: http://www.indianacatalog.net

INCOLSA: INCOLSA (Indiana Cooperative Library Services Authority) is a membership-based library consortium for Indiana libraries. Among other services INCOLSA manages INSPIRE, INCat, and Wheels. INCOLSA is also Indiana's OCLC Regional Service Provider. INCOLSA has no sales responsibility for OCLC but is responsible for billing, training, and support of OCLC products and services.
URL: http://www.incolsa.net

Interlibrary library loan (ILL): ILL is a service that allows libraries to share materials with other libraries. The transaction is library-to-library on behalf of end users. The home library is responsible for the material.

Odyssey: No-charge software that supports transmitting scanned articles as TIF files to other libraries over the internet. The software at the other end accepts the document and changes it to PDF for easy delivery to the user. Odyssey was developed by Atlas Systems, the developer of OCLC ILLiad. Odyssey is an open protocol allowing any other application to interoperate with Odyssey.
URL: http://www.atlas-sys.com

OCLC: OCLC is a not-for-profit library cooperative. OCLC offers WorldCat, the largest bibliographic database extant with over 73 million bibliographic records and over 1 billion associated holdings. WorldCat is the platform for INCat and for other state and large regional group catalogs. Indiana has unlimited WorldCat searching through the FirstSearch interface. OCLC also offers a cataloging system used by nearly all large libraries in the United States and offers the national default interlibrary loan system.
URL: http://www.oclc.org

PALNI: The Private Academic Library Network of Indiana is a non-profit membership organization founded in 1992, providing sophisticated resource-sharing and library automation services to its 24 member libraries.
URL: http://home.palni.edu/InfoShare/

PLAC: Public Library Access Card. A library program run by the Indiana State Library that allows Indiana residents to borrow materials directly from any public library in Indiana.
URL: http://www.statelib.lib.in.us/WWW/isl/ldo/plac.html

Remote Circulation: While interlibrary loan is a transaction between libraries, remote circulation is like traditional circulation in that the transaction is between the end user and the library that owns the material. It differs from traditional circulation in:
- Supplying library staff pulls the material from the shelves
- Supplying library usually ships the material to the home library, not to the end user
- Home library, not the end user, is responsible for returning the material.

Wheels: Wheels is Indiana's state-wide delivery system. Materials are packed in zippered nylon bags with delivery codes for labels. Libraries pay by the number of stops per week, not the number of bags shipped or received.

Resource Sharing: Resource Sharing is an umbrella term covering all activities where libraries provide access to materials beyond their collection. It covers traditional interlibrary loan, use of document suppliers, and remote circulation, but is not restricted to those activities.

ILL Codes

American Library Association Interlibrary Loan Code
http://www.ala.org/ala/rusa/rusaprotools/referenceguide/interlibrary.htm

Indiana Resource Sharing Manual
http://www.statelib.lib.in.us/WWW/ISL/ldo/reshman.html

International Federation of Libraries (IFLA) ILL code
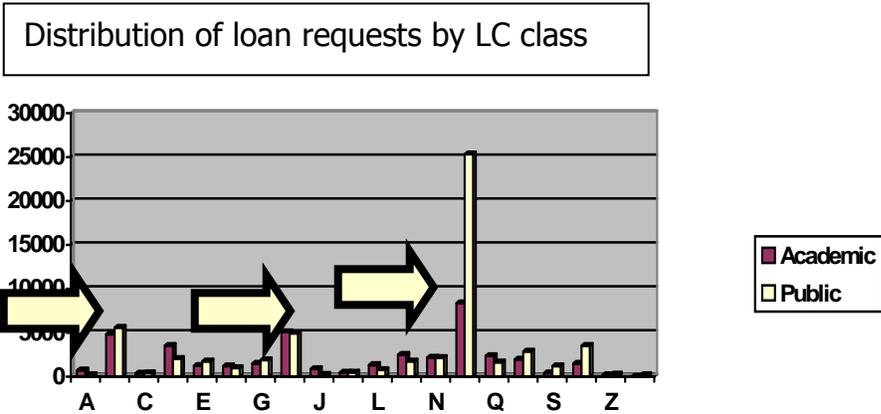http://www.ifla.org/VI/2/p3/ildd.htm

Appendix B: Analysis of Sample Data

The statistics in this report are based on a sample of Indiana's top 20 borrowing and top 20 lending libraries, 29 libraries in total (Appendix C). Interlibrary loan activity mirrors the academic year with the busiest months being October-November and February-March. INCOLSA pulled borrowing and lending activity for the sample libraries for the 2005/2006 peak. The data set represented 95% of the borrowing and 80% of lending in Indiana during the measurement months.
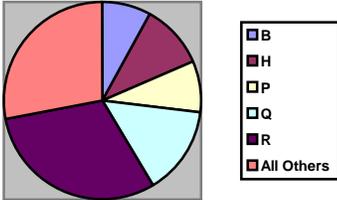
What are we borrowing?
- Loans 64% Copies 36%
- English language materials
    o 92% overall
    o 92.7% of copies
    o 91% of loans
        ▪ Academics--82% English language
        ▪ Publics--98% English language
- Subjects: B (Philosophy/Religion), H (Social Sciences), P (Fiction/Literature), Q (Science) and R (Medicine)
- Loans (books): B, H, P
    o With the exception of literature/fiction (P), academics and publics borrow in the same subject areas at about the same rate.
    o 33% are recent publications, published within the last 6 years.

Distribution of loan requests by LC class

Philosophy/Religion   Social Sciences   Literature/Fiction

- Copies (photocopies); B, H, P, Q, R
  - Academics request 98% of the copies. Highest demand in the hard sciences (science and medicine).

Copy Distribution		
B (Philosophy/Religion)	4,836	8.2%
H (Social Science)	6,155	10.4%
P (Literature/Fiction)	4,975	8.4%
Q (Science)	8,500	14.4%
R (Medicine)	18,126	30.7%
All others	16,514	33.6%

Who is borrowing?

- Academics and publics—95% of all requests created during the sample months were by academics and publics
  - Academics requested 59% of all borrowing, 98% of all copies
    - Loans   43.5% of all academic requests
    - Copies   56.5% of all academic requests
  - Publics requested 36% of all borrowing, 2% of all copies
    - Loans   98% of all public library requests
    - Copies   2% of all public library requests

Who are we borrowing from?

- Overall
  - 66% from Academics
  - 28% from Publics
  - 6% from all other types
- Academics
  - 90% from other academics
  - 5.6% from publics
  - 4.6% from all others
- Publics
  - 27.6% from academics
  - 63.4% from other publics
  - 9% from all others
- In and out of state
  - Copies   49% from within Indiana, 51% from out of state
  - Loans   67% from within Indiana, 33% from out of state

Borrowing Distribution		
Academic:	**102,247**	**62%**
Academics:	91,962	90%
Public	5,727	5.6%
Other	4,588	4.6%
Public	**62,751**	**38%**
Academic:	17,197	27.6%
Public:	39,813	63.4%
Other:	5,741	9%

Appendix C: Sample Libraries

Indiana Top Borrowing and Lending Symbols
(Libraries in bold are both top borrowing and lending)

1. **Allen County Public**
2. **Ball State University**
3. **Butler University**
4. **DePauw University**
5. Elkhart Public (L)
6. Evansville Public (L)
7. **Indiana State University**
8. **Indiana University**
9. IU South Bend (B)
10. IUPU Fort Wayne (B)
11. **IUPUI**
12. IU Med (L)
13. **INCOLSA-Bloomington**
14. INCOLSA—Fort Wayne (B)
15. INCOLSA—Mishawaka (B)
16. INCOLSA—Muncie (B)
17. INCOLSA—New Albany (B)
18. INCOLSA—Valparaiso (B)
19. Indiana Wesleyan University (L)
20. Indianapolis Marion County Public Library (L)
21. Lake County Public (L)
22. Johnson County Public (L)
23. Mishawaka Penn Public (L)
24. Monroe County Public (L)
25. **Purdue University**
26. **University of Indianapolis**
27. **University of Notre Dame**
28. Valparaiso University (B)
29. Wabash College (B)

Appendix D: Task Force Members

INCOLSA invited the top three lending Academic and Public libraries, the chair of the ALI Resource Sharing Task Force, and representatives from the Indiana State Library, the Indiana Shared Library Catalog (ISLC), PALNI, the top lending medical library, and users of the I*Ask service. The following are the individuals who accepted the invitation to be part of the taskforce:

Janet Brewer	Anderson University
Jim Corridan	Indiana State Library
Christy Ann Groves	Ball State University
Kathy Halaschak	INCOLSA I*Ask
Collette Mak	INCOLSA
Robert Roethemeyer	Concordia Theological Seminary
Rita Rogers	Indiana University, Bloomington
Ron Sharp	Indiana State Library
Elaine Skopelja	Indiana University--Medical
Carolyn Strickland	Lake County Public Library
Suzanne Ward	Purdue University