

CSU+ Resource Sharing Program Philosophy

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Statement of need

In pursuit of improving CSU+ processing workflows in Alma the Resource Sharing Functional Committee (RSFC) has faced challenges in the decision making process. Each campus representative brings a unique perspective to the discussion often resulting in differing ideas about how limited resources should be prioritized and what it means to effectively serve patrons. Since the CSU does not have documented CSU+ priorities or measures of effective patron service, discussions about changing Alma workflows circle around each institution's reasons their campus would or wouldn't be well-served by a decision. These discussions are based on purely anecdotal evidence without any supporting data and as a result the committee arrives at a stalemate.

This philosophy provides a north star to guide future discussions. Instead of each campus representative measuring the results of a new configuration or initiative against a personal perception of what is good for their library, the RSFC together can ask "Is CSU+ providing the greatest level of access? Is this helping to move items as fast as they can be moved?" while defining data points that would measure whether or not new decisions are supporting the intent of the accepted principles.

CSU+ Philosophy

The CSU+ resource sharing program was born from the decision to move all 24 CSU libraries to a shared library management tool with improved resource sharing capabilities. The CSU has made great strides in creating a functional consortial resource sharing system that ships many thousands of items between campuses around the state. The Resource Sharing Functional Committee (RSFC) continues to improve CSU+ by researching new workflows, product features, and outlining best practices. A defined and accepted philosophy will help guide the choices and priorities of the RSFC, providing a vision to measure current and future resource sharing features

and products. This vision is particularly important when high impact resource sharing initiatives pose both benefits and challenges and require analysis, resources and decisions that affect shared services.

The importance of a philosophy and measures of success for our “new” resource sharing consortium have been highlighted by experts in the field (Kochan & Leon). Lars Leon and co-authors from the Greater Western Library Alliance (GWLA) describe the need for these principles thusly: “A clear understanding of the consortium’s philosophies and the environment is necessary in order to identify what works best for the group as a whole.” (p. 427).

CSU+ directly supports priority number 2 of the [Strategic Priorities approved by the Council of Library Deans](#), approved in November 2017. The Strategic Priorities were specifically written to “guide the collective actions of the CSU libraries” with priority number 2, Shared Collections, described as follows:

“In support of existing and emerging research and teaching activities, the CSU Libraries facilitate discovery, delivery, and preservation of information resources and strive to acquire, preserve, and provide equitable access to shared information resources for all students and faculty regardless of campus.”¹

Using the Shared Collections Strategic Priority as a starting point, three core principles to guide resource sharing practice in the CSU system stand out:

1. Seamlessly provide access to all materials to all users equally regardless of campus affiliation

Sharing as many physical library resources via CSU+ as possible supports the goal of providing “equitable access to shared information resources for all students and faculty regardless of campus”. Similarly, some of the core ideas of the GWLA Conceptual Best Practices framework revolve around providing access to all GWLA materials to all GWLA patrons: “Specifically, they lend anything a local GWLA patron can charge out and remove from his/her local library,” and commit to “serve local patrons and patrons of every other library in the consortium equally.” (Leon et al. 2003)

Beyond the CSU, the broader Interlibrary Loan Code for the United States² also supports generous lending in section 5.4, asking lending institutions to “Consider filling all requests for material regardless of format or the collection in which it is housed.” In the explanatory notes, the authors go on to say “Supplying libraries are encouraged to lend as liberally as possible regardless of the format of the material requested, while retaining the right to determine what material will be supplied.”

In the CSU, we have the capability to push this one step further by creating a shared library collection and shared library experience for users across the system, reducing barriers to cross-campus accessibility to library materials. To achieve this goal, CSU libraries can lend more physical material via CSU+ to the CSU community at

¹ <https://calstate.atlassian.net/wiki/spaces/COLD/pages/337608718/CSU+Libraries+Strategic+Plan+-+2018-2021>

² <http://www.ala.org/rusa/guidelines/interlibrary>

every campus. Additionally, maximizing the features and workflows of Alma to lend items and formats currently shared using other products, such as digital items and ebooks, would simplify the requesting process for library users, reducing technical barriers to content.

2. Obtain the correct item and get it to the patron as quickly as possible

Resource sharing workflows and best practices will be designed based on their positive or negative effect on the end user. Published interlibrary loan literature focusing on user satisfaction consistently shows the most valued pieces of interlibrary loan service are:

- Accuracy of request fulfillment and good physical quality of the material received (Gaffney, Little, Yang)
- Speed of service. Library users want the items they request as quickly as possible. (Gaffney, Little, Voyles, Yang)

Speed and accuracy of service will be used as primary measures to evaluate and manage the CSU+ program. Workflows will be evaluated and optimized using feedback from CSU+ practitioners and transactional data. Additionally, the CSU will actively collaborate with other consortia and vendors to improve existing products with a primary focus on features that increase processing speed and request accuracy.

3. Commit to continuous, evidence-based assessment of CSU+

Data will be consistently and routinely gathered and interpreted to measure CSU+ performance. Comparative data analysis will focus on supporting philosophies one and two above and will be key to the future growth and maintenance of CSU+. Justifications for changing, starting, or ending services will include evidence.

Conclusion

System-wide recognition and adoption of these three core principles will support effective management and growth of the CSU+ resource sharing program, guiding RSFC efforts on projects such as:

- Analyzing and revising the CSU+ rota
- Defining prescriptive CSU+ best practices with a focus on decreasing turnaround time
- Analyzing lending policies to increase the number of items that are available for resource sharing
- Investigating digital, article and ebook borrowing/lending in Alma

Current and future resource sharing program initiatives should be evaluated using data collection and user-focused satisfaction tools and measured against their demonstrated ability to support these principles.

Works cited and consulted

Interlibrary Loan Code for the United States <http://www.ala.org/rusa/guidelines/interlibrary>

CSU Library Strategic Plan 2018 - 2021

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