

The Future of UBorrow

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Executive Summary

As we build a foundation for the first mile marker of the Big Collection and our goal of any content, from anywhere to anyone in perpetuity, it is imperative that we leverage interconnectedness to achieve equitable access across the consortium. As a continuation of our work a team of the ILL Coordinators, along with a representative able to evaluate technical aspects who were charged by the Steering Committee, will evaluate the needs of the consortium around resource sharing. This included a deep dive into the formats left behind because of licensing and technology issues, and looked at what work has already been done, and what other consortiums are doing or planning to do.

To accomplish our resource sharing and access goals of the BIG Collection we are proposing a set of recommendations, each of which are integral in realizing the vision of the collective collection. We have also drafted some charges to address how to begin this complicated work. The recommendations are listed in order of priority, but also by what we think can be accomplished sooner rather than later.

Brief Recommendations

1. UBorrow Platform refresh (Time Sensitive and High Priority)
 - a. The consortium's needs around resource sharing have dramatically changed since the implementation of UBorrow on the D2D platform. Almost all other consortia have already or plan to migrate away from this platform, although our position has yet to be determined.
2. Resource Sharing Policy harmonization across the BTAA: What is preventing us from sharing a format or collection?
 - a. In order for BTAA users to experience the Big Collection as a single collection rather than 15 different collections, we must “consolidate and simplify policy frameworks across the BTAA to harmonize service expectations and provide greater predictability” (Dempsey, Malpas, & Sandler, 2019).
3. As a follow up or in alignment with the ReCAP Pilot, evaluate the Ivy Plus Library Confederation’s (IPLC) development and use of the Platform for Open Data (POD), where they are “working to create a platform that positions data reuse and service



integration as strategic assets” and use that data to meet various library needs, including resource sharing and shared print.

4. Prioritize digital access to all collections to ensure we have equivalent rights and systems to lend e-resources, including streaming media and other traditionally non-lendable formats, as well as digital surrogates of our print collections

Barriers

One of the main barriers the team found in regards to this work is the lack of transparency into the vast amount of collaboration already happening within the BTAA around the Big Collection. Initially our team thought it would make sense to have one of the goals center around the peer groups and how they interact with each other, but after more deliberation, we have decided that this issue is larger than we can take on and that work is already underway around this important issue.

Recommendations:

1. **UBorrow Platform Refresh** : Resource sharing technology continues to evolve, although not as fast as our needs evolve. It is imperative that the BTAA take this time to investigate what system would not only work best now, but will also evolve into the future.
 - We need a system that can:
 - Move us beyond just the sharing of print materials
 - Explore new types of digital lending, including what is formally known as CDL.
 - Provide better tracking and statistical analysis
 - **Goal:** Investigate developments in resource sharing systems to meet our current and emerging needs. Provide recommendations for next steps and potential implementation of a new system or the continued use of D2D.
 - The Steering Committee (or Library Directors) charges a team to lead this investigation. The team should be made up of a mix of ILL Coordinators, as well as representation from IT.
2. **Resource Sharing Policy Harmonization Across Institutions:** What is preventing us from sharing a format or collection?
 - **Goal:** Ensure our resource sharing policies at the collection level across the BTAA are allowing for the free flow of materials across the consortium.
 - A team charged by the Steering committee, one with a mix of BTAA ILL Coordinators, BTAA Access Services Group, and the Collection decision makers (CDO/ERO), as well as a second with ILL/Fulfillment representation and the Special Collections peer group. They will be charged to investigate and identify the biggest gaps in circulation of collections and resource sharing policies which prevent the freeflow of

collections between institutions. The teams will consider the inclusion of policies around consortial access to:

- Books (across all non-Special collections)
- Media (across all non-Special collections)
- ILL of reference, bound periodicals, and microform
- Special Collections
- Data retention to allow us to analyze usage for continuous improvement of the service and the needs of the consortium and our users
- The team will also ask individual libraries to look at where their local policies may prevent access.

3. Pilot Investigation of the Platform for Open Discovery (POD)

- Goal: As a follow up or in alignment with the ReCap Pilot, evaluate the Ivy Plus Library Confederation's development and use of POD, they are "working to create a platform that positions data reuse and service integration as strategic assets." and use that data to meet various library needs, including resource sharing and shared print.
 - The Steering Committee works with Maurice to construct a Pilot team
 - Does POD fit into a kit of parts solution?
 - The team should consider whether or not there is space to collaborate and work with the IPLC on the development and use of POD.

4. Digital Access to Collections:

- Goal: Ensure we have equivalent rights and systems to lend e-resources, including streaming media and other traditionally non-lendable formats, as well as digital surrogates of our print collections.
- Responsibility and future step:
 - CDO/ERO group:
 - The Steering Committee will ask the CDO/ERO group to make this a goal of their work, particularly as it relates to licensing and any format that is currently electronic, but not shareable such as streaming video. They should also consider how to mediate next steps for the CDO/EROs:
 - Immediately:
 - Ensure each member library has a means of sharing license terms with ILL staff and begin negotiating/renegotiating licenses according to the report's prioritization recommendations. This will be aided by the BTAA staff
 - Update the [BTAA Library Initiatives Standardized Agreement Language](#) to address ebooks; and build a consortial toolkit and organize training to aid member library employees in successfully negotiating with vendors. Set consortium-wide targets for reducing licensing restrictions related to

ILL within member library collections, with the ultimate goal of the BIG Collection being free of such restrictions within a calendar year.

- Address both new licensing agreements as well as a plan for renegotiating existing licenses when they come up for renewal.
- Within several years: Consider how to provide time-limited access to a specific item, in order to create ubiquitous digital access for material from locally digitized to licensed e-resources. This would include the lending of e-resources that are not PDFs and thus not easily shared through ILL file-sharing mechanisms (e.g, streaming media, data sets, and supplementary materials).
- ILL/Fulfillment Team:
 - Immediately implement recommendations from the [2021 BTAA ILL of Ebooks Task Force Report](#) (p.4-6). In particular:
 - BTAA ILL Coordinators should review and implement recommendations for resource sharing workflows for ebooks at their libraries.