

Collaborative Futures Impact Report



COLLABORATIVE FUTURES VISION

The Collaborative Futures vision sees Ontario university students, faculty and researchers experiencing a large, diverse, province-wide library collection, moving seamlessly between different types of content. With increased access to more books and specialized content than ever before, these resources are incorporated into research, learning and teaching workflows.

Ontario Council of University Libraries member employees work collaboratively in support of this vision.

This approach builds upon existing collaborative initiatives across the Ontario Council of University Libraries membership, such as Scholars Portal technology and collaborative licensing, as well as smaller-scale initiatives including shared integrated library systems and print storage facilities.

Keys to achieving the Collaborative Futures vision include:

- Implementation of shared next-generation library services platforms.
- Collaboration to manage and preserve print resources in a sustainable system.
- Collaboration to effectively use shared systems to manage electronic and print resources.

WELCOME

Welcome to our second Collaborative Futures (CF) report! It's exciting to look back and celebrate the many advances since our inaugural report in 2020. While the pandemic interrupted the production of these reports, it certainly did not halt the efforts of a veritable legion of library colleagues as we collectively worked to propel our CF vision forward.

The CF vision articulates the possibilities that could be realized through our radical collaboration. Building on decades of collaboration and cooperation, this vision helps position the Ontario Council of University Libraries (OCUL) to address the evolving scholarly communication and higher education landscape during a period of rapid technological change and reduced resources.

This report highlights CF achievements from 2021 and 2022, including the shared network that means students, researchers and faculty can now use Omni, the academic search tool, to request shared physical resources quickly and easily from across all 18 partner universities.

This advent has been a game changer, promising far-ranging ripple effects in the way physical collections are discovered and used. We've seen extensive evidence of this already as students, researchers and faculty immediately began to find works of interest, submit requests for titles not held by their own library and have them seamlessly delivered for pickup soon after. The numbers speak for themselves: the original CF vision is coming to fruition!

While we highlight several successes in this report, a favourite of mine is the CF Mini Conferences. These events feature lightning talks on a multitude of topics and are a perfect example of how best practices and other lessons can be shared across our institutions.

Looking ahead, we anticipate there will be equally impactful developments as work continues with a focus on accessibility and addressing harmful language in subject headings. We'll see renewed efforts to strengthen and extend existing connections across the shared network and OCUL, as well as a commitment to enhancing our

communications so our vision and goals are clearly articulated across the CF community.

Finally, my deepest gratitude to everyone – both past and present – whose tireless efforts have brought us to where we are today. Thank you to the countless colleagues who participate(d) on the array of committees, subcommittees and working groups but also, importantly, to all those who work with our systems every day, who encounter and flag issues so that we can continue to improve the shared network experience and elevate the CF vision.



Catherine Davidson

Chair, Collaborative Futures Steering Committee (2021-2023)

COLLABORATIVE FUTURES MILESTONES

2013 – OCUL Next Generation Library Platform Summit launches conversations about deeper collaboration among members as a response to changes in scholarly communications, higher education, and technology. OCUL initiates the Collaborative Approaches Task Force.

2014 – Collaborative Futures (CF) initiative is born. OCUL creates a 2020 vision for a large, diverse Ontario-wide library collection that can be seamlessly navigated and is easily incorporated into research, learning and teaching workflows, regardless of location.

2015 – OCUL identifies CF Priority Collaboration Outcomes: 1) cataloging and management of shared bibliographic records; 2) implementation of a consistent discovery interface across libraries; 3) consistent borrowing policies and terms of service; 4) direct physical and electronic lending between partner libraries; 5) shared analytics to facilitate the management and stewarding of the shared Ontario-wide collection.

2016 – Thirteen OCUL members agree to the procurement of a shared library services platform (LSP). Remaining OCUL members indicate potential future adoption of the shared LSP.

2017 – OCUL develops a robust governance structure for the CF initiative to ensure collaborative decision-making and policy development. The network of OCUL library employees working within shared LSP starts to build.

2018 – Ex Libris Alma LSP and the Ex Libris Primo VE discovery and delivery solution identified as the platforms to support CF. Preparations begin to implement the shared LSP.

2019 – With the Alma LSP and Primo VE solution as its technological infrastructure, Omni, Ontario's academic search tool, launches at 14 OCUL member universities. Omni opens access to resources in every field of study ensuring the sustainability of a broad collection of shared resources.

2020 – Omni in use at 16 OCUL member universities. The network of people and resources supporting Omni continues to expand.

2021 – Students, faculty and researchers can request and borrow physical items from all partner libraries from within Omni, providing easy access to a collection of over 23.5 million physical resources from across Ontario.

2022 – Omni instituted at 18 OCUL members universities. Students, faculty, and researchers can pick up physical items requested from any partner library, regardless of home university.

NEXT-LEVEL COLLABORATION

As part of Collaborative Futures, over the last two years Omni has progressed to the next level of collaboration across participating libraries. A shared network collection opened lending beyond each partner university's libraries, simplifying the borrowing process for students, faculty, and researchers, as well as library staff.

This Omni feature wasn't possible overnight and was the result of partner libraries working together to problem solve, troubleshoot, and use a collaborative mindset to ensure this new system was up and running efficiently, as soon as possible.

Working together also benefited the relationships built through collaboration, as staff from each school had the opportunity to build trust and get to better know their library colleagues.

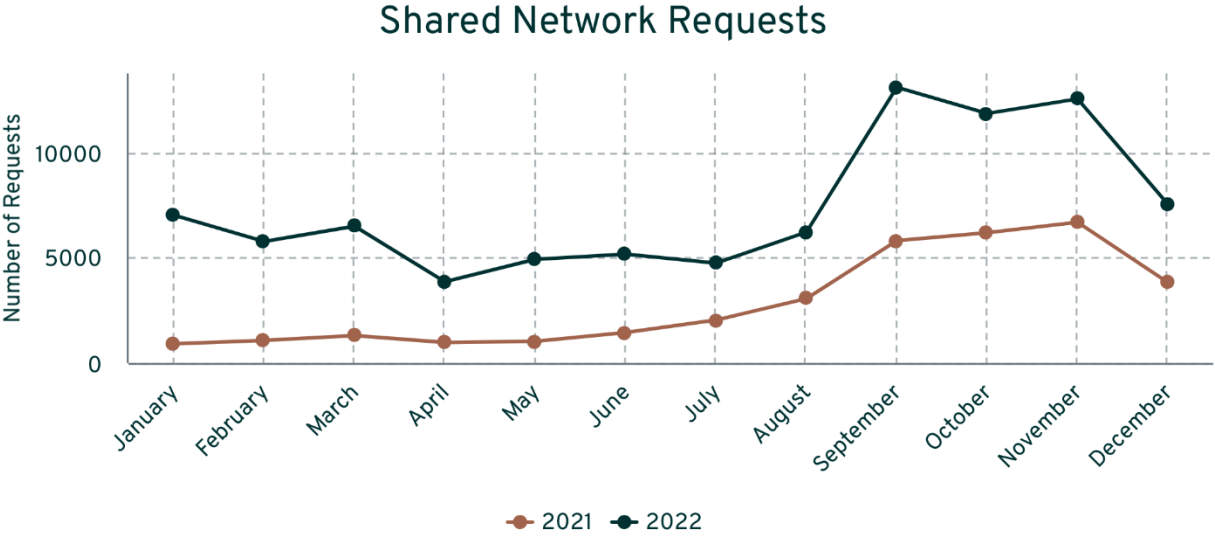
With this sharing, 18 universities now have access to more than 25 million physical resources – a number that grows daily. As we see resource access progress beyond the physical and into the digital realm, we anticipate this expansion will continue.

"Omni has been an invaluable resource for my university career...Attending a university in Northern Ontario, which may not have the same resources as schools in other parts of the province, means that the ability to access texts and knowledge from other institutions is integral to finding sources and reference material."

~ Undergraduate Student

SHARED NETWORK SUCCESSES

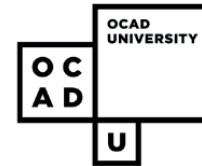
- **25,400,000** – Physical resources available for lending in the shared network as of June 2022.
- **123,806** – Total shared network requests since January 2021.
- **13,113** – Highest number of requests in a single month (September 2022).
- **5,536** – Average monthly requests since shared network launch.



Note: Statistics refer to request for physical items from Omni partners.

Partner Libraries

As of December 2022, eighteen OCUL members support the Omni academic search tool.



SPEED OF SERVICE

The introduction of a shared network has increased the speed of library service in several ways, including ease of requesting, delivery service and staff workflows.

The process of requesting a book from another university has been simplified through the use of Omni and the shared network. Students, faculty and researchers can search for and request a physical resource from a partner library in the same way they would a resource at their home university. This in turn has reduced the number of interlibrary loan requests that go through the automated service RACER, a progressive move that helps libraries prepare for RACER's sunset in 2023-24. This more efficient delivery service across partner universities has, for the most part, meant that resources are delivered within a few days of requesting them.

From the library workflow perspective, the shared network has simplified the book request process as requests from other partner universities appear on the same list as those from the home institution. Staff can collect all requests from the same list and send books to their designated destinations, improving libraries' internal efficiencies.

"It's great to be able to search the catalogue and see that an item I need/want is at an Ontario university and could arrive within a few days — and they do! I was amazed at how fast my items arrived after requesting them on the weekend."

~ Associate Professor

ACCESS TO RESOURCES

With the implementation of Omni and the shared network, university students, faculty and researchers' library experiences have been enhanced and barriers reduced by not having to separately search a catalogue, a database and RACER to find items. Instead, they can visit Omni and find everything all in one spot.

Access to each of the partner university's physical resources means there are now resources that weren't previously available except through RACER or by traveling to another library. This was doubly impactful throughout the COVID-19 pandemic when travel was not as possible and work from home was the norm.

Increased access has also contributed to resources being more widely circulated beyond their home library. More use means a broader range of research topics can exist, increasing the likelihood for less-circulated items to be requested.

“Omni allows me to discover titles of interest both from my institution and from universities around the province. Being able to request materials directly and receive them promptly is integral to my work as a researcher, administrator, and teacher.”

~ Dean, School of Graduate and Postdoctoral Studies

BUILDING COLLECTIVE KNOWLEDGE

Essential to Collaborative Futures (CF) is the capacity to build collective knowledge. We see this demonstrated through the initiative's various working groups, subcommittees, Mini Conferences, and drop-in calls, but perhaps above all through the Expert Advisory Network (EAN).

Almost daily through the EAN, workers from partner university libraries ask questions, brainstorm on how to solve a problem and interact with new ideas. It's a space for those working in the same areas of operation at different libraries to connect and discuss policy development, changes within the shared network, and future opportunities for collaboration.

Sparked by these EAN conversations are the Drop-In Calls. A genuine camaraderie has come out of people sharing what's happening at their library and the calls have become a safe, supportive space where participants can turn for help or to learn about what other libraries are doing that could improve their workflows (or confirm they're getting it right!). Evolving from once weekly to now monthly calls, topics have included platform accessibility, the fulfillment network expansion, network logistics and workflow, Controlled Digital Lending, and more.

Beyond these avenues, CF Mini Conferences are an opportunity for post-secondary library workers from across Ontario to come together, share ideas and learn from one another. Topics presented at these online events range from adopting new technologies to changing workflows and challenges/opportunities for collaboration.

CF Mini Conference Highlights

- **3** – Mini Conferences held between 2021 and 2022.
- **25** – Presentations and lightning talks.
- **41** – Presenters from OCUL member libraries.
- **450+** – Attendees joining the online events.

Here's what attendees have shared about their CF Mini Conference experience:

"A number of the sessions were about topics I have never heard of! But, it's always good to learn new things." ~ Attendee, 2022

"I found the presentation offerings interesting, innovative, and relevant to my work." ~ Attendee, 2022

"I liked the diversity of topics; even if not all presentations were directly applicable to my position it was great to learn so much!" ~ Attendee, 2021

COLLABORATIVE DECISION-MAKING

Collaborative Futures (CF) subcommittees and working groups play a critical role in advancing our shared vision of radical collaboration to face the challenges of today's university libraries.

Together, a network of support and resources continues to enhance sharing across partner schools, empowering their students, faculty, and researchers to confidently navigate and access materials. On behalf of all partner libraries, the subcommittees and working groups examine and address shared issues and develop shared policies to remove barriers and increase collaboration.

CF Subcommittees

CF subcommittees help foster network connections across all partner libraries and provide a framework for further collaboration and problem-solving. A highlight of this work comes from CFDUX – the group addressing discovery and user experience.

The subcommittee proposed changes to an Omni policy requiring a default search scope, which generated a lot of interest and comments within the community.

In response, CFDUX made it possible for User Experience Librarians at partner schools to collaborate on a study to determine the benefits and trade-offs of the proposed policy changes and to support partners in determining the best solution for their context. The study resulted in an evidence-based decision that considered the unique needs of partner libraries and their students, faculty, and researchers.

Subcommittees:

- Communications (CFCOMM)
- Discovery and User Experience (CFDUX)
- Metadata Management and Standards (CFMMS)
- Shared Policy (CFSP)
- Shared Resources (CFSR)
- Systems and Analytics (CFSA)

CF Working Groups

CF Working Groups investigate a particular issue or opportunity and suggest ways to address it. For example, to help remove barriers to use in Omni, the Accessibility Working Group developed procedures for reporting and registering accessibility issues at a consortial level. These procedures have made it easier for staff to identify and flag shared accessibility issues for the working group, which can then be tested and reported to leadership and other CF committees.

The Decolonizing Descriptions Working Group concluded its work in 2022, culminating in a report with steps and recommendations to more accurately and respectfully reflect Indigenous Peoples, knowledges and context within Omni.

This report incorporated best practices in relationship-building and consultation to ensure ongoing changes are made in a way that follows principles developed by organizations such as the First Nations Information Governance Centre.

Starting in 2023, the Decolonizing Descriptions Implementation Working Group will move forward the report recommendations focused on CF-wide practices and documentation for the implementation of decolonized vocabulary.

Working Groups:

- Accessibility (2021-ongoing)
- Alma Resource Sharing (2022-ongoing)
- Automated Fulfillment Expansion (2021-2022)
- Decolonizing Descriptions (2021-2022)
- Memorandum of Understanding (2022)
- Network Zone E-Resources Management (2021-ongoing)
- Network Zone Metadata Maintenance (2020-ongoing)

To learn more about Collaborative Futures:

- Visit the [OCUL website](#)
- Email ocul-cf@ocul.on.ca
- Follow [OCUL on Twitter](#)

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