OCUL
Ontario Council of University Libraries

2022-2023 ANNUAL REPORT

STRATEGIC PRIORITIES

Three strategic priorities guide our work between 2022 and 2025.

These priorities were established to identify areas of focus for the consortium and in support of member libraries' goals.

Supporting Indigenous Reconciliation

Expansion of our Shared Resources and Infrastructure

Supporting Hybrid and Flexible Learning

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WELCOME

Welcome to the 2022-2023 annual report for the Ontario Council of University Libraries (OCUL).

I'm pleased to present this snapshot of the consortium's services and initiatives, as it highlights the collective strength of the 21 academic libraries at the heart of OCUL. As you will read in this report, the year brought substantial change and growth, part of which was three strategic priorities set by the OCUL Directors to guide our collaborations and projects over the coming years. These priorities speak to expanding shared resources and infrastructure, supporting flexible learning, and a commitment to Indigenous reconciliation – all in the context of how to best contribute to the success of learners and researchers across the province.

I thank the OCUL members, Directors and staff for their dedication to our strategic priorities and the initiatives reflected in this report. It's because of their leadership, expertise and enthusiasm that our accomplishments today, and in the future, are possible.

AMBER LANNON
OCUL Chair (2022-2023)
and University Librarian,
Carleton University

EXECUTIVE DIRECTOR'S MESSAGE

Since joining OCUL as Executive Director at the end of 2022, I've had the opportunity to visit many of our member libraries to learn more about local needs and meet the teams who contribute to consortial digital infrastructure and resource sharing. My sincere gratitude to everyone who gives of their time and insights to collaborate in the development and delivery of transformative library services. It's this cooperative, expert work and pooling of resources that achieves efficiencies and innovations often out of reach at the individual institutional level. It's work emblematic of what we call thinking and acting "OCUL-y" and I thank the OCUL Directors and members for their many contributions.

We also welcomed several new staff members to OCUL over the past year, which allows us to devote time and resources to further develop work- and information flows, pursue new initiatives and enhance collaboration among consortia members. In this report, you will meet the team and read highlights of OCUL work from the past year. I look forward to reporting again in 2024, with updates about these and other exciting initiatives we have underway.

AMY GREENBERG
Executive Director

Amy was appointed OCUL Executive Director in 2022, following a North America-wide search.

Amy has worked for OCUL since May 2003 when she was first hired as a User Support Librarian for the implementation of a consortia-wide interlibrary loan system. Subsequent roles included serving as the Scholars Portal Client Services Librarian, Associate Director responsible for Research and Member Services, and Interim Associate Director of Scholars Portal. From 2015 to 2017, Amy took a brief hiatus from Scholars Portal to manage OCUL's Collaborative Futures project. In this role, she coordinated the consortium's preparations for and procurement of a shared library services platform and was instrumental in facilitating the vision of "radical collaboration" underpinning the initiative.

MISSION & PRINCIPLES

Fundamental to OCUL is the commitment to innovative and equitable library services that contribute to the success of learners and researchers across Ontario.

In 2022, the 21 library directors that comprise the OCUL Council revitalized the consortium's mission – The OCUL Way – and the core principles woven through every facet of our work.

THE OCUL WAY

OCUL is a collective of Ontario academic libraries who, together, contribute to the success of learners and researchers across Ontario through innovative and equitable library services.

OCUL advances research, teaching, and learning by collaborating at scale in the development and delivery of innovative and transformative services, resources, and digital research infrastructure for Ontario's universities.

OCUL is a key partner in a transforming teaching, learning, and research environment that surpasses the expectations of students, faculty, and staff across Ontario.

OUR CORE PRINCIPLES GUIDE OCUL DECISIONS AND ACTIONS.

01

Advancing research

OCUL expands the breadth and depth of research resources and services available to member institutions. We seek out innovative strategies for preserving and curating research resources. We advance open access to scholarship.

02

Advancing teaching and learning

OCUL develops and delivers robust, user-centred and sustainable services to support the academic success of students and faculty at Ontario universities. By working together, we build capacity across member institutions.

03

Advancing academic libraries as leaders in social change and inclusivity

OCUL is dedicated to diversity and inclusion and values different ways of knowing. We respectfully build and deliver services, resources, spaces and research that support these intentions.

04

Developing and supporting robust infrastructure

OCUL enhances the technological infrastructure and staff expertise required to support the evolution of teaching, research, and learning.

05

Demonstrating value

OCUL advances the efforts of Ontario's academic libraries to transform scholarship and revolutionize the delivery of library services and resources by modeling both an evidence-based approach to its practices and a strong focus on communicating value.

COLLABORATIVE FUTURES

omni
Academic Search Tool

For nearly ten years, Collaborative Futures has advanced a shared vision for library management systems that sees Ontario university students, faculty and researchers accessing a large and diverse province-wide library collection, seamlessly moving between print and digital resources.

A major outcome of this vision is Omni, the academic search tool, and a shared network that together form a singular pathway for users to discover resources for their research, teaching and learning.

Through Omni, students, faculty and researchers can access over 25 million print resources and pick up requested items from any of the 18 partner universities in Ontario. Omni is also where they can search for e-resources. And it is thanks to the efforts of the Network Zone E-Resources Management Working Group and the Network Zone Metadata Maintenance Working Group that these resources are more discoverable, requestable and accurate in the search tool.

These inter-university teams ensure the accuracy of entitlements and licensing terms of use and the quality of metadata for shared records and common resources on behalf of whole network. Their aim is to make Omni work the best it can for the libraries that manage the system and the students, faculty and researchers who rely on it. It is critical work that supports OCUL's vision of shared infrastructure in support of a large, diverse Ontario-wide library collection, and illustrates the power of radical collaboration. In 2022-23, these Working Groups have cleaned and corrected more than one million records and activated 300 e-resource packages in the shared network to improve search and access in Omni.

MEET THE OCUL TEAM

ANIKA ERVIN-WARD

Assistant Director, Collaborative Initiatives

Anika has been part of the OCUL team since 2012 and has served in three roles: first as the Administration and Communications Coordinator, then as interim Executive Director, and now as the Assistant Director, Collaborative Initiatives.

She works directly with OCUL members through committees and working groups, to ensure all the threads of an often-complex network of activities are brought together cohesively. As she explains of her Collaborative Initiatives position, "It's bringing people together to make decisions and share knowledge that helps build capacity in our member libraries."

Anika holds a BA (Honours) and a Bachelor of Commerce, plus a PhD in Cinema Studies.

ALEX FLETCHER

Omni Technology and Network Zone Specialist

Alex joined OCUL in summer 2022, after more than a decade at Queen's University Library and prior to that as a member of the university's central IT group. It was his work with Collaborative Futures groups during and after the library's Alma migration that broadened his experience to larger scale projects. When asked about his role with OCUL, he says, "I love collaboration and how I can facilitate it — and how much I get to learn every day from people across Ontario."

Alex also holds an honours bachelor's degree in computer science.

INFORMATION RESOURCES

Since the 1990s, OCUL has led an extensive program of consortial e-resource purchasing and licensing to support members' academic teaching, learning and research.

OCUL provides workflow efficiencies by centrally managing and negotiating licensed content on behalf of member institutions. A significant undertaking of this work is the negotiating with publishers and vendors from around the world. Whether a license renewal or acquiring a new e-resource, negotiations involve a multi-step process that provides time for member engagement, the development and approval of negotiation terms, vendor communications, and the offer period. The goal is to offer members the lowest pricing possible, extending their collections budgets and saving library staff resources in the process.

In 2022-2023, there were higher than usual increases on most renewals, due to rising costs and vendors holding pricing lower or flat during the COVID-19 pandemic. OCUL negotiated a large number of resources to reduce annual increases, with an average 2% total price increase over the previous year.

Looking ahead, the Information Resources Licensing & Local Load Subcommittee is continuing its work to develop model licenses that present an ideal set of terms and conditions, including accessibility requirements, that will be used as a starting point for vendor negotiations.

2022-2023 BY THE NUMBERS

220 managed licenses, including databases, newspapers, ebooks, ejournals, and video streaming.

$22.5 million USD spent on OCUL-managed e-resources.

$2.66 million CAD spent on OCUL-managed e-resources.

2% average increase for renewed e-resources.

MEET THE OCUL TEAM

CHRISTA FOLEY

**Assistant Director,
Information Resources
and Collections**

Christa has worked in a consortial setting for the entirety of her career. Prior to joining OCUL in 2022, she was the Licensing Librarian at The Alberta Library for 16 years. Christa also holds an MLIS from Western University.

Exceptional customer service is at the heart of Christa's role at OCUL. She works with schools to make sure their needs are represented to vendors and that they offer resources the schools want and need, at the lowest possible price. "Negotiating for schools to get the best available resource prices makes my day. I love a good deal!"

EDITA ALWI

**Information Resources
and Collections
Specialist**

Edita has been part of the OCUL team since 2019. She was previously the Administrative Assistant and also assisted with information resource licensing and renewal workflows.

Edita has a background in procurement and in early 2023, she transitioned to her new role as OCUL's Information Resources and Collections Specialist.

SCHOLARS PORTAL

As a service of OCUL, Scholars Portal provides a shared technology infrastructure and shared collections for Ontario's university libraries.

Over 2022 and 2023, Scholars Portal planned and initiated several transitions to new platforms and systems as longstanding backend technologies reached the end of their lifecycle.

Exemplifying OCUL's core principle of developing and supporting robust infrastructure, Scholars Portal has undertaken three significant projects to ensure the sustainability of resource sharing and data collections across the consortium and beyond.

RACER – The automated interlibrary loan service

The software that RACER is built on will reach its end of life in 2024, requiring Scholars Portal to sunset the current iteration of its automated interlibrary loan service. In preparation, Scholars Portal started coordinating the transition away from the software and continued to focus on optimizing resource sharing in the shared library services platform used across a majority of OCUL member institutions. This involved working closely with OCUL and colleagues in Quebec and across Canada, plus major interlibrary loan system vendors, to test and troubleshoot communication between systems and advocate for greater interoperability between platforms. Additionally, Scholars Portal developed a one-year project map to identify potential obstacles, guide internal and member processes to minimize RACER use, and help seamless resource sharing continue.

Scholars GeoPortal – The geospatial data discovery tool

Scholars GeoPortal turned 10 in 2022. It's an exciting milestone but also brings the need to renew some of the technological infrastructure that supports the service. As part of this redevelopment project, Scholars Portal upgraded to the latest Esri ArcGIS Enterprise software and enabled HTTPS security for web access to the GeoPortal, which supports required maintenance updates and sets up a new environment for future enhancements. Meanwhile, a working group was assembled to draft a formal business case and list of functional requirements for the future of GeoPortal's frontend interface. The working group laid out specific recommendations for GeoPortal, such as modernizing the frontend of the GeoPortal application using the latest web frameworks and technologies, and the integration of a data loading tool that would enable OCUL member libraries to upload their own local GIS data collections to the portal. The redevelopment project started in October 2023.

Odesi – The social science data exploration and analysis tool

After 15 years, Nesstar, the backend repository that supports Odesi, is reaching its end of life. Borealis, the Canadian Dataverse Repository, was selected as the replacement repository to provide backend support to Odesi collections. Borealis provides extensible features for Odesi collections, including file versioning, curation, and built-in preservation for library administrators. This migration work was supported by a grant from Compute Ontario. Upon the new release, much of the data in Odesi will be open and accessible to all researchers, in the spirit of the FAIR principles (Findable, Accessible, Interoperable, and Reusable). Moving forward, OCUL is working with a variety of stakeholders and partners to develop a model for the service's ongoing sustainability.

[READ THE 2022-2023 SCHOLARS PORTAL ANNUAL REPORT](#)

Scholars Portal
A Service of the Ontario Council of University Libraries

GOVERNANCE

The participation of member libraries is key to OCUL's success.

Each of the libraries is represented by its director who sits on the Council and, together as the OCUL Directors, govern the consortium's work. In addition, OCUL members are represented across 40+ groups and committees to share knowledge, support workflows, and provide important input into OCUL's shared services.

Based on a governance review that culminated in 2022, more than 20 recommendations were established to help shape the processes and structure of OCUL. Initial steps for implementation of these recommendations were underway in 2022-2023 and include:

Staff Roles and Responsibilities

Restructuring OCUL staff roles to better support assessment, governance administration and governance groups.

Information Management

Establishing a management process and cycle for organizational records and supporting the SPOTDocs platform and content migration.
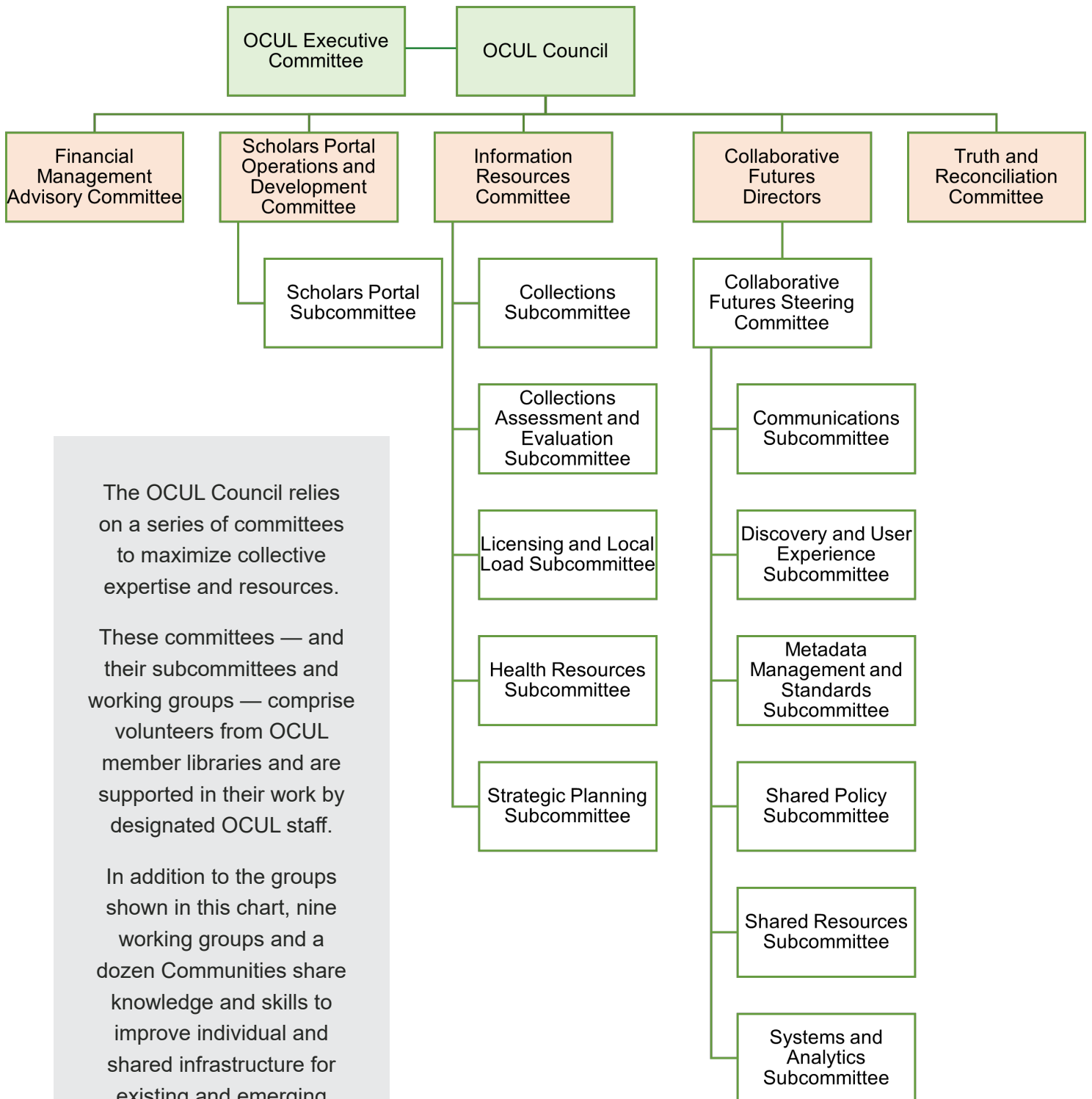
Governance Documentation

Developing a portfolio of orientation and governance materials to improve information finding, reporting pathways and transparency.

Three longstanding OCUL Directors stepped back from their work with the consortium in 2023, as they embarked on new adventures outside of their university libraries.
Our profound gratitude extends to Gohar Ashoughian (Wilfrid Laurier University), Joy Kirchner (York University) and Brent Roe (Laurentian University) for their steadfast commitment to OCUL and their years of governance expertise.

OCUL COMMITTEES & GROUPS

OCUL Executive Committee — **OCUL Council**

- **Financial Management Advisory Committee**
- **Scholars Portal Operations and Development Committee**
  - Scholars Portal Subcommittee
- **Information Resources Committee**
  - Collections Subcommittee
  - Collections Assessment and Evaluation Subcommittee
  - Licensing and Local Load Subcommittee
  - Health Resources Subcommittee
  - Strategic Planning Subcommittee
- **Collaborative Futures Directors**
  - Collaborative Futures Steering Committee
    - Communications Subcommittee
    - Discovery and User Experience Subcommittee
    - Metadata Management and Standards Subcommittee
    - Shared Policy Subcommittee
    - Shared Resources Subcommittee
    - Systems and Analytics Subcommittee
- **Truth and Reconciliation Committee**

The OCUL Council relies on a series of committees to maximize collective expertise and resources.

These committees — and their subcommittees and working groups — comprise volunteers from OCUL member libraries and are supported in their work by designated OCUL staff.

In addition to the groups shown in this chart, nine working groups and a dozen Communities share knowledge and skills to improve individual and shared infrastructure for existing and emerging initiatives.

MEET THE OCUL TEAM

NUR ARTOK
Business Officer

Nur holds a bachelor's degree in economics and is a certified CPA, CMA with over 20 years' experience in finance and accounting roles. She joined OCUL in 2014 and collaborates closely with the Council of Ontario University and University of Toronto Libraries finance teams to contribute to decision-making processes.

Nur is passionate about numbers and finds great meaning in connecting financial data to overall strategy, which allows her to guide OCUL financial decisions, ensuring resources are allocated wisely and effectively to support the consortium's mission.

KATRINA FORTNER
Administration and Communications Coordinator

Katrina brings more than 15 years of public relations and marketing-communications experience to her role with OCUL. She works closely with the Executive Committee and OCUL Council, plans and develops member and governance communications, and coordinates the twice-annual Directors Meetings.

Prior to coming to OCUL in early 2023, Katrina served in communications roles in university research centres and libraries, national non-profit organizations and economic development. She holds a Master of Public Relations and a Master of Arts in women's studies and feminist research.

ELLIE RUGGLES
Administrative Assistant

Ellie joined OCUL in 2023 and in her role provides administrative support for many of the consortium's governance groups and the Executive Director. She also assists with information management projects and processes across OCUL.

Ellie previously held administrative positions in the non-profit sector and in Trent University's international development studies department. In addition, she holds a BA in international development studies and an MA in public issues anthropology.

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ACKNOWLEDGEMENTS

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