

**2023
2024**



OCUL Ontario Council of
University Libraries

ANNUAL REPORT

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MESSAGE FROM THE CHAIR



Reflecting on my time as Chair of the Ontario Council of University Libraries (OCUL), it is clear that among the consortium's many strengths are a profound sense of community and the ability to collectively create opportunity. We work together to find solutions to today's challenges, and since our inception, have innovated and adapted to ensure the relevance of our shared services and digital infrastructure for the benefit of Ontario scholars.

Highlights from this past year include the tremendous efforts of several working groups and task forces that explored resource-sharing solutions and open access at OCUL, identified AI and machine learning projects for the consortium, plus led the assessment of our first shared evidence-based acquisition program. OCUL also established a national online community of practice to facilitate ongoing knowledge-sharing about AI and machine learning, and a partnership between the Canadian Association of Research Libraries, University of Toronto Libraries and OCUL created a framework for Scholaris, the national shared institutional repository service hosted by Scholars Portal. You will find these milestones and more spotlighted in this annual report.

My deepest gratitude extends to the OCUL members, directors and staff. It is your enthusiasm and forward thinking that propels us to bold, new action. I am excited to see what is next for OCUL in this ever-changing academic library landscape.

Catherine Steeves

Vice-Provost and Chief Librarian, Western University
OCUL Chair (2023-2024)

**MESSAGE FROM
THE EXECUTIVE DIRECTOR**



I am proud to welcome you to the 2023-2024 OCUL Annual Report.

Across OCUL and our service arm, Scholars Portal, it has been a time of evolution. Throughout the past year, we prepared to sunset one of Scholars Portal's longest running services and mapped an approach to the future of resource sharing between OCUL member libraries and our partners. We expanded the variety of e-resources available to our members and made information more open to students, faculty and researchers. We celebrated the exceptional contributions of the members who helped enable the implementation of the Omni academic search tool and shared network. We also identified key projects to grow our collective expertise and hands-on experience with artificial intelligence and machine learning technologies. These activities are a snapshot of our accomplishments over the past year, and they exemplify the core principles that guide our decisions and actions at OCUL — principles you will see reflected throughout this report.

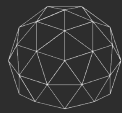
I continue to be inspired by the many ways our members, staff and communities work together to advance innovative and equitable library services. Thank you for your commitment to the success of learners and researchers across Ontario.

Amy Greenberg

OCUL Executive Director

ADVANCING **RESEARCH**

OCUL expands the breadth and depth of research resources available to member libraries and academic communities across Canada. We seek out innovative strategies for preserving and curating research resources. We advance open access to scholarship.



scholaris A Canadian Shared Institutional Repository Service
Un service partagé national de dépôt institutionnel

LAUNCHING SCHOLARIS

Institutional repositories play a vital role in advancing scholarship and fostering open access to research. In 2023, the Canadian Association of Research Libraries, OCUL and the University of Toronto Libraries established a framework for the collaborative development of Scholaris, a Canadian shared institutional repository service managed by Scholars Portal.

Starting with an early adopter program, the goal is to build Scholaris into a robust and scalable national service – one that is strengthened by a responsive, cooperative community of digital repository and metadata experts. Two schools, Ontario Tech University and the University of Toronto, were the first to pilot Scholaris. Thirteen additional post-secondary institutions make up the first two early adopter cohorts, with work underway throughout 2024 to launch their local instances of the repository infrastructure.

Visit scholaris.ca to learn more about the Canadian shared institutional repository service.

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OPEN ACCESS AT OCUL

Open access (OA) can accelerate innovation by allowing researchers to readily find and build upon each other's work. In 2023, the OA Working Group, under the guidance of the OCUL Information Resources Committee, examined how OA is addressed locally among the consortium's member libraries. An environmental scan identified key priorities for the working group to address in their ongoing activities, which include the development of assessment criteria to evaluate licenses that incorporate OA and recommendations for an OCUL-wide position on open access.

In early 2024, OCUL also became the first Canadian consortium to sign an agreement with The Company of Biologists. The five-journal Read and Publish agreement provides participating member libraries with unlimited access to three hybrid journals and uncapped, no-fee publishing of accepted OA research articles in five journals.

In addition, OCUL extended the opportunity to member libraries to participate in Path to Open, a three-year JSTOR pilot program designed to make exclusive book titles from a variety of publishers open access.

Open Access Working Group

- Emily Carlisle, Western University (co-chair)
- Roger Reka, University of Windsor (co-chair)
- Denise Smith, Brock University
- Mark Swartz, Queen's University
- Paul St. Pierre, University of Guelph

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.

ACADEMIC LIBRARIES, AI AND MACHINE LEARNING

The rapidly growing field of artificial intelligence and machine learning (AIML) is fundamentally changing the work of academic libraries. In fall 2023, a task force comprising OCUL Directors and guided by Michael Ridley, Librarian Emeritus at the University of Guelph, took the lead in exploring how OCUL could develop AIML expertise and skills to enhance library services and staff capacities.

After broad consultations with university library and archives staff, technology experts and regional consortium leaders, the task force released its interim report. The report presented use cases for machine learning in academic libraries while considering key issues such as ethical concerns, technical capacity, available expertise and infrastructure needs. More than 90 participants from across OCUL and various Canadian institutions joined an online summit in March to gather ideas and feedback to inform the task force's final report.

Amid the interim report and summit, a hackfest was hosted at McMaster University to facilitate applied learning using the OpenAI transcription tool, Whisper, and the national AIML community

of practice that was established by OCUL in January 2024 surpassed 300 members.

In May 2024, the task force's final report and recommended strategies for an OCUL AIML Program were presented to the OCUL Council. The Council approved two years of funding to support five initial projects that will help the consortium understand scenario, workflow and structural challenges related to different types of AIML work. It is from these collaborative projects that OCUL aims to create reusable tools and techniques that can be adapted for future initiatives and to strengthen the collective, responsible progress of AIML in academic library spaces.

Task Force on Machine Learning and AI

- Catherine Steeves, Western University
- Mark Asberg, Queen's University
- Mark Robertson, Toronto Metropolitan University
- Michael Ridley, University of Guelph
- Scott Gillies, Wilfrid Laurier University
- Talia Chung, University of Ottawa
- Vivian Lewis, McMaster University

ADVANCING ACADEMIC LIBRARIES AS LEADERS IN **SOCIAL CHANGE AND INCLUSIVITY**

OCUL is committed to building and delivering services that honour different lived experiences and support inclusive experiences for individuals accessing library resources to support their academic scholarship.

COLLABORATIVE FUTURES AND ACCESSIBILITY

Evolving from its years as a working group, the new Collaborative Futures Accessibility Subcommittee launched in spring 2024. The subcommittee was founded on the understanding that accessibility is a collective responsibility requiring collaboration and consultation across OCUL member libraries.

Within the Collaborative Futures initiative, the subcommittee champions proactively identifying and removing barriers within the Omni academic search tool and the shared network that disadvantage individuals with disabilities. This includes monitoring and reporting on accessibility issues, recommending enhancements and policies that improve accessibility, and advocating for accessible products/interfaces from a user-centred perspective.

Accessibility Subcommittee

- Mark Weiler, Wilfrid Laurier University (chair)
- Carling Spinney, Queen's University
- Catie Sahadath, Ontario Tech University
- Emily Gibson, Queen's University
- Eva Lu, University of Waterloo
- Michelle Agostini, York University
- Pascal Calarco, University of Windsor

DEVELOPING AND SUPPORTING **ROBUST INFRASTRUCTURE**

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

RACER WIND DOWN AND ALMA RESOURCE SHARING

As the backbone of OCUL's interlibrary loan system, for more than 20 years Scholars Portal's RACER service provided rapid access to collections via electronic requesting. Ahead of the anticipated end-of-life for the software that RACER was built on, OCUL and Scholars Portal identified a roadmap to sunset RACER and investigate resource sharing solutions to potentially replace the consortium-wide service.

In spring 2023, the OCUL Council formed a working group to explore how resource-sharing functionality in the current Alma-based network meets the needs of member libraries and Canadian consortia partners. The working group evaluated several products and determined that no single platform provided the interoperability to support borrowing and lending between OCUL and non-OCUL partners. The final recommendation to Council was that Alma remain the core of OCUL's interlibrary loan infrastructure and that OCUL develop and integrate additional resource-sharing functionality into the system.

Throughout 2023-2024, Scholars Portal and OCUL staff worked to manage the shift from RACER to Alma and complete the transition of resource sharing in OCUL from a Scholars Portal service to a foundational element of the Collaborative Futures initiative.

OCUL continues to develop relationships with regional academic consortia, seeking out additional partnerships with libraries to expand an Alma-to-Alma network.

Feasibility of Resource Sharing Solutions Working Group

- Harjinder Rana, University of Toronto
- Kristy McKeown, Trent University
- Lynne Serviss, McMaster University
- Mandy Dean Kassies, Brock University
- Nicola Sikkema, Queen's University
- Robin Sakowski, University of Guelph
- Samantha Gibbon, University of Waterloo
- Scott Gillies, Wilfrid Laurier University

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OMNI DROP-IN SESSIONS

One of the most popular knowledge-sharing touchpoints OCUL hosts are the regular Omni Drop-in Sessions, where members learn about new resource sharing features, troubleshoot Alma or Omni issues, discuss metadata management and more. In 2023-2024, nineteen drop-ins were held with an average of 50 attendees per session.



THE NEW SPOTDOCS

For almost 20 years, SPOTDocs has been the documentation hub for OCUL and Scholars Portal. Over 7,000 pages and nearly 19,000 attachments were amassed throughout this time, resulting in challenges for information retrieval and preservation. When the decision was made to migrate SPOTDocs to a new, more cost-effective platform, it provided an opportunity to address content accumulation, refresh information architecture, and build guidelines for consistent content management practices. Consultations with the SPOTDocs user community took place in spring 2023 to identify requirements and preferences for the

new platform, and in February 2024, SPOTDocs was successfully migrated to its new home on XWiki.

This multifaceted work supported the overarching goal of meeting users' needs of finding, creating and managing information and addressed the recommendation for improved information flow across the organization from the 2022 OCUL Governance Review. As we move forward with the new SPOTDocs, content reviews will occur on a more consistent basis with scheduled transfers of legacy content to organizational repositories.

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.

BY THE NUMBERS — OCUL INFORMATION RESOURCES

OCUL negotiates and manages hundreds of e-resource licenses to offer members the lowest possible cost, extending their budgets and saving library staff resources.

220

OCUL-managed electronic resources, including e-books, e-journals and video streaming.

\$9.3 million

saved in 2023-2024 on e-resource spending.

\$23.3 million

spent on managed e-resources (USD).

2%

average increase for renewed e-resources.

\$2.38 million

spent on managed e-resources (CAD).

NOTE: ALL MONETARY FIGURES ARE APPROXIMATE.

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PILOTING CONSORTIAL EVIDENCE-BASED ACQUISITION

Between May 2023 and April 2024, nineteen OCUL member libraries took part in a pilot project with Wiley, giving access to the publisher's 24,000 e-book titles as part of a shared evidence-based acquisition (EBA) program. This was the first shared EBA program at OCUL.

After its successful rollout, the pilot project was assessed by an EBA working group, under the leadership of the OCUL Information Resources Committee. The group's analysis found that several of the participating schools gained broad access to titles that would otherwise be unaffordable and extended the reach of information resources available to students, faculty and researchers.

All participating member libraries renewed their involvement in the program in 2024.

Consortial EBA Working Group

- Shawn Hendrikx, Western University (chair)
- Alicia Zorzetto, Brock University
- Dave Gall, University of Waterloo
- Ingrid Moisil, University of Ottawa
- Jacqueline Cato, Western University
- Janice Adlington, McMaster University
- Kieren Bailey, OCAD University

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CELEBRATING MEMBERS' OUTSTANDING CONTRIBUTIONS

This past year marked the return of the OCUL Outstanding Contribution Award, after being on hiatus since 2017. The award is designed to recognize the tremendous efforts OCUL members contribute to advance the consortium's mission and that embody the values of networking, collaboration and community. Two Collaborative Futures project teams were celebrated for their achievements that helped enable the successful implementation of the Omni academic search tool and shared network.

The Automated Fulfillment Network Pilot Team led initial shared network operations within the TriUniversity Group of Libraries. This intensive work was what set the stage for the network to expand to Omni partners beyond the original three university libraries.

Automated Fulfillment Network Pilot Team

- Adam Taves, York University
- Brandon Uhlman, University of Waterloo
- Dillon Moore, Wilfrid Laurier University
- Doug Horne, University of Guelph
- Juliene McLaughlin, University of Guelph
- Matt Van Ast, University of Guelph
- Randy Oldham, University of Guelph
- Robin Sakowski, University of Guelph
- Samantha Gibbon, University of Waterloo
- Vera Fesnak, Wilfrid Laurier University (RETIRED)

The Automated Fulfillment Network Expansion Working Group extended the shared network from the three initial universities to the (then) 16 Omni partner schools and continued forward to support Alma-to-Alma borrowing and lending.

Automated Fulfillment Network Expansion Working Group

- Brandon Uhlman, University of Waterloo
- Dan Scott, Laurentian University
- Joanne Rumig, Carleton University
- Lisl Schoner-Saunders, Algoma University
- Mandy Deans Kassies, Brock University
- Matt Van Ast, University of Guelph
- Monica Rettig, Brock University
- Randy Oldham, University of Guelph

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SHARING KNOWLEDGE WITH LIBRARY COMMUNITIES

ELUNA (Ex Libris Users of North America) Annual Meeting – May 2023

“Alma Resource Sharing: Automated Fulfillment Network and Resource Sharing in a Consortium”

Randy Oldham (University of Guelph), Alex Fletcher (OCUL), Brandon Uhlman (University of Waterloo)

Electronic Resources and Libraries Conference – March 2024

“Sharing is Caring: A Shared Consortium EBA Experience. One step towards collaborative collecting, an OCUL approach”

Christa Foley (OCUL), Dave Gall (University of Waterloo), Janice Adlington (McMaster University), Shawn Hendrikx (Western University)

ICOLC (International Coalition of Library Consortia) North American Meeting – April 2024

“AI Afternoon – Licensing and Text/Data Mining”
Panel

Miranda Bennett (California Digital Library), Dyveke Sijm (Royal Danish Library), Amy Greenberg (OCUL)

“AI Afternoon – AI Applications” Panel

M Ryan Hess (Statewide California Electronic Library Consortium), Amy Greenberg (OCUL)

“Consortia to Consortia Resource Sharing” Panel

Rose Nelson (Colorado Alliance of Research Libraries), Christopher Lee (California State University), Amy Greenberg (OCUL), Maureen Clements (State University of New York)



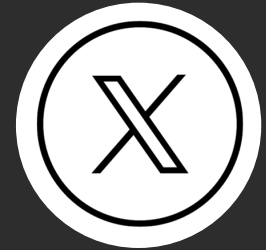
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