



Collaborative Collections

The Evolution of Collective Physical Resources
Management and Ownership

Lili Daie, Alma Product Manager



Agenda

- The challenges
- The answer: Cooperation and collaboration
- How Alma can help
- How Network Zone can help further
- Fulfillment and patron experience



The Challenges

- Shelving space
- Budget constraints
- The “Long Tail”: Hard-to-find materials, very useful to few patrons in each library

The Answer: Cooperation and Collaboration

SPECIAL COLLECTIONS

Housed where
most relevant



SHELVING SPACE

= Shelves x Libraries



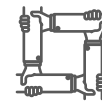
LOW-USE RESOURCES

Held by single library,
circulated on-demand



COLLECTIVE PURCHASING

Maximizing
budget efficiency



FEWER COPIES REQUIRED

Maximizing budget
efficiency



HIGH-USE RESOURCES

Multiple copies in all/most
libraries





How Alma Can Help

Item Retention – New for August

- Assuring physical items' retention by preventing deletion
- Managing physical items' retention reasons and notes
- Easy to manage using set management, bulk processes and imports
- Providing retention information through Analytics, APIs & publishing for efficient collaborative collection management

Set Item's Retention Information

Retention Information

Committed to Retain No Yes

Retention Reason **Consortia last copy** Retention Note

- Consortia last copy
 - Alumni Publication
 - Consortia last copy
 - Faculty Publication
 - Institution last copy
 - Institutional Affiliation
 - Library's last copy
 - Local commitment to retain
 - Other institutional affiliation
- Look-up or select

Retention Reason

Table code: RetentionReason
Patron Facing: No
Customization mode: Entire table needs to be customized

Table Description: Item Retention Reason

Filter: English

	Move Up	Move Down	Code	Description	Translation
1			LibraryLastCopy	Library's last copy	Library's last copy
2	▲	▼	InstitutionLastCopy	Institution last copy	Institution last copy
3	▲	▼	ConsortiaLastCopy	Consortia last copy	Consortia last copy
4	▲	▼	RareItem	Rare Item	Rare Item
5	▲	▼	OtherInstitutionalAffiliator	Other institutional affiliatio	Other institutional affiliation

Code

Description

Default Value

Add Row

Easily Identify Retained Items

Physical items Keywords

Search in: Physical items Zone: Institution Community


Look-up or select Equals Yes

Physical item : Committed to Retain

Clear form Search

Status: All Year: All Volume: All Description: All Receive Date: All

	Barcode	Library	Location	Call Number	Item Call Number	Description	Temporary Location	Status	Process type	Committed to Retain
1	19058	Main Libra...	Main	QK475.8 .U36	-	-	No	Item in place	-	Yes

1  **A tree is nice. Pictures by Marc Simont.** [Edit Item](#) [Request](#) [...](#)

Book By Udry, Janice May. ([New York] Harper, c1956.)

Barcode: 19058

Library: Main Library

Creation Date: 12/17/2011 21:43:04 PM IST

Call Number: QK475.8 .U36

Call Number Type: Library of Congress classification

Status: Item in place

Due back: -

Material Type: Book

Item ID: 234593180000541

Holdings ID: 224593190000541

MMS ID: 991097340000541

Add Item Retention in Bulk

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

Change retention information

Set item **commit**ted to retain to: Yes No

Retention reason Condition

Retention note Condition

↑



How a Network Zone Can Help

Item Retention

The Network Zone allows libraries to:

- View items' retention information across all members for NZ shared catalog records
- Manage shared collection and retention information using network Analytics, e.g.:
 - Identify titles held by single member, by metadata or network's Link ID, to add retention commitment
 - Identify titles held by multiple members, to assess collection redundancy
 - Check loans per institution, to evaluate holding's usage and efficiency

See Network Members' Retained Items

< 'Held By' Details

Back

135 tips on email and instant messages : plus blogs, chatrooms, and texting / Lindsell-Roberts, Sheryl. Houghton Mifflin ...

Held by Institutions ▾

Training - Member 1 - Clean

Holdings (2)

Portfolios (0)

Representations (0)

Electronic Collections (0)

Orders (0)

Show All Items



Year: All ▾ Volume: All ▾ Description: All ▾

- 1 Library: Graduate Library
Location: Stacks
Call Number: HD30.37 .L532008
No. of Items: 1
Available: 1
Committed to Retain: 1
No. of Requests: 0

List of Items

Back

135 tips on email and instant messages : plus blogs, chatrooms, and texting / Sheryl Lindsell-Ro...

1 - 1 of 1

Barcode ▾



Sort routine ▾



Status: All ▾ Year: All ▾ Volume: All ▾ Description: All ▾ Receive Date: All ▾

Barcode	Call Number	Item Call Number	Description	Status	Process type	Public note (Physical Item)	Receiving date	Committed to Retain
1 1462189	HD30.37 .L532008	-	-	Item in place	-	-	-	Yes

Identify Titles with a Single Holder in the Consortium

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Location /Shared Folders/Alma/Consortia/Reports ▾ Show Hidden Items

Type All ▾ Sort Name A-Z ▾ Show More Details

	Number of active (not deleted) bibliographic records per institution in consortia Last Modified 5/26/2021 10:39:04 AM Owner exlobi Open Edit More ▾
	Number of fully processed COUNTER files per institution in current calendar year Last Modified 6/6/2021 11:15:58 AM Owner exlobi Open Edit More ▾
	Number of fully processed COUNTER files per institution in previous calendar year Last Modified 6/6/2021 11:16:52 AM Owner exlobi Open Edit More ▾
	Percent of overdue returns per institution Last Modified 2/1/2021 9:24:04 AM Owner exlobi Open Edit More ▾
	Titles with inventory in only one institution based on field 035 subfield a with library and location Last Modified 8/24/2021 12:22:57 PM Owner exlobi This is a list of titles which have no overlap. They exist in only one member institution. The check for overlap is based on the value of the 035 field subfield a. Open Edit More ▾

▶ Preview

Joint Use and Storage

The shared catalog and Network Zone also lets libraries:

- Establish host locations: Purchasing in one institution while shelving at another
- Managing a shared / collective storage as a location in a single IZ
- Managing collective storage as a dedicated IZ

Automatically Generate Items When Purchasing for Another Institution in Your Network

Host Location Configurations

Set inventory in host location [i](#)

Host Institution * ▾

Host Location * ▾

Automatically create an item in host library upon receiving [i](#)

Withdraw item upon copying to host library [i](#)

Provenance of the host's item

Place item in the host's 'In Process Items' list [i](#)

Work order type status * ▾

Add Locations / Libraries / Institutions from Your Network to Discovery

MEMBER 2

Configuring: Training - Member 2 - Clean

Alma

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

Define a Custom Scope

Cancel Save

Scope Details

Code * joint

Name * Joint Use

Description

Scope Population My Institution Entire Network

Scope Conditions

+ Add a Condition

No conditions have been

Up to three conditions can be defined

Search Index

Other Institution Inventory: Other Institution Locations

Operator

Equals

Value

TRAINING_MEMBER1_CLEAN:Music Library: Periodicals

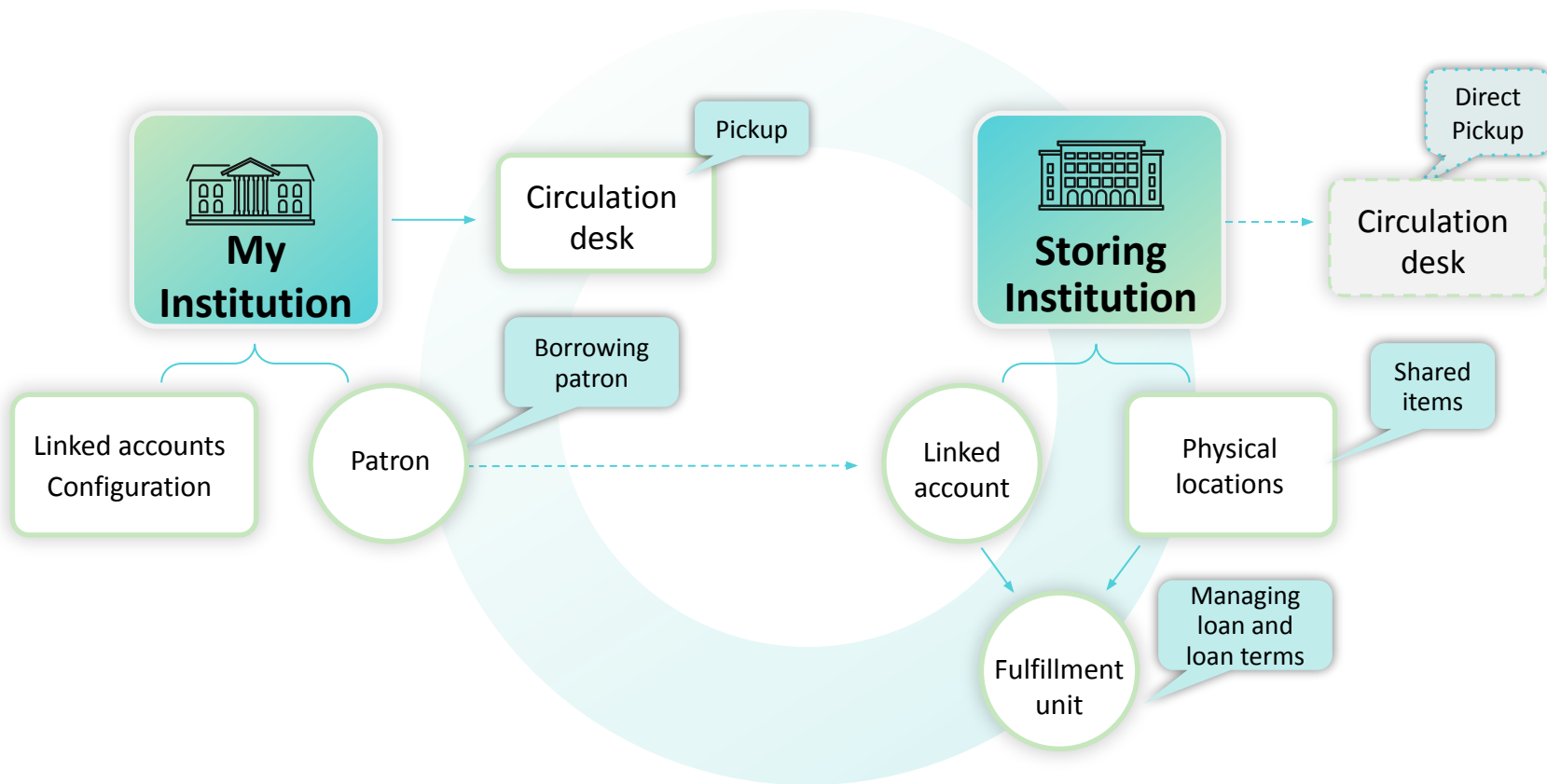


What About Fulfillment and the Patron Experience?

The Fulfillment Experience When Item is Shelved Elsewhere

Patron Experience	Classic	Fulfillment Network	Automated FN
Network Zone required	No	Yes	Yes
Loan owned & managed by	Patron's home library	Item owner	Item owner
Pickup	Patron's home library	Anywhere	Anywhere
Patron information	Patron's home library	Patron's home library, item owner and pickup library	Patron's home library, item owner and pickup library
Patron action	RS request (Automated ROTA locates item)	Direct requesting from item owner	RS request (Automated ROTA locates item)
Library workflows	RS request (supports multiple protocols)	Uses regular hold request workflows	Combines RS abilities with hold workflows

Storage at Another Institution using FN / AFN



Taking Collaboration to the Next Level: Rapido

- Pods: Building multiple collaboration networks and communities
- Next level patron experience
- Coming soon: Controlled Digital Lending

Want to know more?

“A peek into the future: Controlled Digital Lending in libraries” –
tomorrow at 9AM

Or talk to Judith Fraenkel during / after IGeLU...

Collaborative Collection Analysis

- Two days ago, there was a Collaborative Collection Analysis workshop here in IGeLU, to assess the main challenges, use cases, focus areas etc. for analyzing these collections.

Want to know more?

“Engaging customers for Collection Analysis Initiative” – today at 4PM, Dora Stoutzker Concert Hall

Or talk to Itai Veltzman during / after IGeLU...

More Resources

- [How to set up Joint Use purchasing in consortia](#)
- [Fulfillment Networks](#)
- [Automated Fulfillment Networks](#)
- [Alma Resource Sharing documentation](#)
- [Last Copy CloudApp](#)

So, How do I use Alma to Strengthen Collaboration?

- Mark items I'm committed to retain, to avoid accidentally withdrawing them
- Communicate my commitments using publishing / APIs
- Manage my commitments and collaborative collections using Analytics
- Manage my network's commitments and collection using NZ & Analytics
- Establishing joint locations in my network
- Exposing the collaborative collection and joint locations in Primo VE

Where Next?

- Future plans for:
 - Retention at the holdings record level
 - Retention at the bibliographic record level
- Come to the roundtable tomorrow at 4PM!
 - A conversation about the future of libraries and shared collections
 - Rowe Beddoe Studio



Questions?



Thank you!

Lili.daie@clarivate.com

