Jennifer Clarke, Assistant Director of Library Collection Development & Access Services, Bucknell University, shares her staff's expectations and reactions to moving to OCLC WorldShare Management Services.

**Situation**

In July 2010, OCLC approached us about becoming an early adopter for OCLC WorldShare™ Management Services (formerly named OCLC Web-scale Management Services). We relayed this invitation to our Vice President for Library and Information Technology, who wanted to know more. He wanted to know what OCLC’s policies for privacy and data security were, he requested a cost-benefits analysis, and he wanted to know what our back-up plan was. He also wanted to learn about OCLC’s service-level agreement. Once we satisfied his initial requirements, we took these findings to our university council.

According to our calculations, the savings would be significant—tens of thousands of dollars significant. The other questions were also answered and the move to WorldShare Management Services was a go.

**Solution**

By early January 2011, there were only a few obstacles we needed to overcome in order to reach an agreement: WorldShare™ Management Services had to be able to provide CAS authentication; they had to support our Summon feed; and we needed to go live by June 30, 2011 so our staff could get the necessary experience in order to be prepared for students’ return for the fall semester. And together with OCLC®, we achieved each one of these requirements.

We started the process by participating in training and webinars that amounted to 3–4 hours per week for 10 weeks. These meetings included webinars with our WorldShare Management Services cohort—member libraries with similar timeframes for implementation. We also held internal meetings to review and revise policies and procedures.

When asked about impressions of the data migration portion of the process, our Systems Librarian, Bill Burkholder, responded that overall, the migration of our data was easier than any prior migration we had gone through. In March, we sent our bibliographic data in files of about 90,000 records to OCLC. In May, we sent our patron data and then in June, our circulation transaction data. On June 13, 2011, we went live—a solid two weeks ahead of schedule.

Continued
Results

Once all of our data was loaded, we had to create new instruction manuals, new workflows—we also had to create constant data records for all material types. And both cataloging and circulation had exception records to clean up. We had originally allocated six months for these activities, but they were nearly completed by mid-August—much faster than we’d anticipated.

There is a fully functional acquisitions module that allows us to place orders, pay for things—everything that we need it to do. Cataloging can now be done in acquisitions upon receipt. When an item is received within the acquisitions model, we have the option to receive an invoice simultaneously, accept the call number provided by OCLC and scan the bar code, which then creates the local holdings record. Books are ready to shelve once the spine label has been applied.

Our catalogers have told me that this process is quick and easy and flows very well. We no longer have to maintain local authority files, and the levels of cataloging that we accept are completely up to us. In our previous system, we took the records and tweaked them to suit our own purposes, but we didn’t share that information with other libraries. Our Library Director, Carrie Rampp, emphasized that Bucknell, along with thousands of libraries, were maintaining holdings in OCLC and scan the bar code, which then creates the local holdings record. Books are ready to shelve once the spine label has been applied.

Materials are now cataloged and sent straight to the shelves, freeing up staff to take on other roles. One of our catalogers is spending more time managing our digital collections and doing enhanced cataloging for special collections. Another cataloger has created more than 70 exhibits in the library that corresponded to major events on campus. Instead of just being “in the back,” she now interacts regularly with our academic and administrative departments.

WorldShare Management Services have also allowed us to develop a sophisticated process for patron-driven acquisitions. When students or faculty search WorldCat® for an item that is checked out, or for an item that we don’t own, they are prompted to complete an ILLiad® Web form. We then make a decision on whether to purchase the item, or we can decide to run it through OCLC’s interlibrary loan service. We have installed a series of purchase add-ons made available through the State University of New York (SUNY) College at Geneseo. So from within ILLiad, we have access to a customized list of our vendors that we order from on a regular basis.

“Within the first two months, we realized significant savings, including cataloging costs, servers and associated expenses, and staff time.”

JENNIFER CLARKE, ASSISTANT DIRECTOR OF LIBRARY COLLECTION DEVELOPMENT & ACCESS SERVICES, BUCKNELL UNIVERSITY

Staff members have become more satisfied with their jobs and professional growth. They have taken on new projects and responsibilities because workflows have become more streamlined. And as a result of WorldShare Management Services, we need to maintain records in only one place, and we enhance those records for the good of all.

OCLC has been true to its word. We’ve experienced significant savings in hardware and through streamlined technical services workflows. We feel that we’re really being listened to and paid attention to—and we are seeing steady improvement. We love the fact that items are “Cataloged in Acquisitions,” creating an extremely efficient workflow. If given the choice, we would definitely do it again! From our perspective, WorldShare Management Services have won the “BFC Award”—it’s Better, Faster and Cheaper. Who says you can’t have it all? OCLC advertised greater efficiencies in workflow and significant cost savings—and it delivered.