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Katina Strauch

Against the Grain, kstrauch@comcast.net

Tom Gilson

Against the Grain, gilson@cofc.edu

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ATG Interviews Rick Lugg and Ruth Fischer

Sustainable Collection Services (now part of OCLC)

by **Tom Gilson** (Associate Editor, *Against the Grain*) <gilson@cofc.edu>

and **Katina Strauch** (Editor, *Against the Grain*) <kstrauch@comcast.net>

ATG: *OCLC acquired your company Sustainable Collection Services (SCS) in January of this year. But OCLC and SCS have been strategic partners since 2011. What prompted the acquisition? How has it changed your relationship? How is it impacting R2 Consulting, the previous firm you founded?*

RL/RF: OCLC members have made it clear they want the cooperative to play a larger role in shared print. That makes perfect sense, given the centrality of **WorldCat** holdings information to any coordinated collections effort. As **SCS** grew, we needed faster, more direct access to **OCLC** data. At the same time, **OCLC** needed a decision-support component to augment their emerging shared print services. It seemed like a good strategic fit for both of us.

We had a good relationship with **OCLC** from the outset, and that continues now that we are all **OCLC** employees. We continue to operate largely independently, but with much better access to the holdings data, with excellent support from other **OCLC** departments, and a host of very smart new colleagues.

R2 Consulting has ceased trading, as the Brits say. We kept it open for a year after we founded **SCS** in 2011, in case that venture didn't work out, but closed it officially in 2012.

ATG: *We suspect that OCLC's resources and contacts within the library world are major pluses for SCS. How is SCS utilizing those resources and contacts? What else is SCS getting from the deal? What about OCLC? What benefits does it accrue from the acquisition that it didn't have as a strategic partner?*

RL/RF: Because of more direct and faster access to **WorldCat**, **SCS** can now support more projects and larger groups. That's a major improvement. We can also provide more sophisticated edition-matching through access to **OCLC**'s work set IDs. This will allow us to match a library's print holdings to its owned eBooks, for instance, or to cluster related editions for retention or withdrawal decisions. **OCLC** also has more marketing reach than we could muster as a four-person entity, so we can make more librarians aware of our services — including, eventually, beyond North America.

There are some new opportunities as well, in particular with shared print initiatives. Formal shared print programs for monographs are still emerging. Sharing is a powerful strategy, but it creates a lot of work. **OCLC** wants to support that workflow through all its stages: selection, registration of retention commitments, discovery, and access. So batch registration of retention commitments will be offered soon, with other services to follow. This will add a new dimension to **WorldCat** holdings,



which will help the library community assure the integrity of the collective collection, and ultimately improve the efficiency of resource sharing.

ATG: *Where does SCS fit in OCLC's organizational structure? Where would we find you and SCS in the OCLC flow chart? How much independence does SCS have in the new arrangement?*

RL/RF: **SCS** reports to **Chip Nilges**, Vice President of Business Development. In some respects, we're being treated as a start-up within the larger entity. **OCLC** very much wants to preserve the entrepreneurial spirit of **SCS**, and to bring some of that perspective into the cooperative. **SCS** is gradually being integrated into **OCLC** planning and budgeting cycles, and our Web presence, conference presence, and marketing have been merged. We'll get some sales support in the coming year. But operationally, **SCS** continues to run as it has. **Rick**, **Ruth**, and **Andy Breeding** all have direct relationships with customers. **Eric Redman** parses and processes all the customer data, and oversees our cloud-based IT environment. We continue to work with our long-time partner, **Argent Software**, on development of **GreenGlass**, including a forthcoming release of **GreenGlass for Groups**. It's a good balance.

ATG: *You just mentioned SCS's Web application GreenGlass. For our readers who may not be familiar with SCS and its services, can you tell us exactly what GreenGlass is and what advantages it gives libraries? How does it help libraries manage and share print collections?*

RL/RF: **GreenGlass** is a purpose-built decision support application for monographs. We take each library's bibliographic, item, and circulation data onto **SCS** servers, where we normalize it and augment it with data

on **WorldCat** holdings, **HathiTrust**, and **CHOICE**. For any title in its collection, a library can see the number of recorded uses, when it was acquired, how many other libraries hold it (in the U.S./Canada, state/province, and among library-specified comparator groups). We note whether the title is in **HathiTrust**, and if so, whether in copyright or public domain. All of these data points appear in **GreenGlass**, which allows visualization of the collection by subject, location, and other criteria. Most powerfully, **GreenGlass** supports multi-factor queries in real time. A simple example: show me titles published before 2005 that have zero recorded uses and are held by more than 100 other libraries in the U.S. and are held by five or more libraries in my state. Queries can be iterated in real time, and well-formatted lists generated at the user's convenience. The **GreenGlass for Groups** capability, available this fall, enables groups of libraries to look at their combined collection, and experiment with criteria for retention, storage, and (if wanted) withdrawals. There is a two-minute introductory video at: <https://www.oclc.org/sustainable-collections.en.html>

ATG: *Admittedly, this is a brand new relationship, but have there been any surprises so far? How do you see the relationship evolving?*

RL/RF: We've worked pretty closely with **OCLC** for the past four years, so we both knew what to expect. The integration to date has been pretty smooth. Over time, we'd expect that **SCS** and **GreenGlass** would be more closely tied with other **OCLC** products related to shared print and analytics. There's potential for combining the decision support offered by **GreenGlass** with the benchmarking capabilities of **WorldShare Collection Evaluation**, for instance. And full support of the shared print workflow will involve not only decision support and registration of retention commitments, but discovery and access options. As libraries gradually bring print collections under shared management, there's a clear connection between retention commitments and resource sharing.

ATG: *In an Against the Grain article entitled "Weeding: The Time is Now" that you wrote in 2008, you said it was time to usher in a "Golden Age of Weeding." SCS has done its best to help make that happen, but where do we stand now? How much progress has been made? Is there still resistance to de-selection among librarians? If so why?*

RL/RF: It depends on the type of library. At the research level, discussion and action revolve mainly around shared print and retention. Among comprehensive universities and four-

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year colleges, there is a good deal of weeding going on, as space pressures mount or library renovations are planned. But even these projects are better described as “independent action in a collective context.” SCS has worked with 160 libraries to date, and every single one has been extremely careful about identifying and protecting scarcely-held items. That’s usually the very first list that is produced. When withdrawals occur, they are typically done with rich context, and a good deal of care: e.g., this title is held by more than 100 libraries in the U.S., more than ten in my state, and among specific resource-sharing partners.

Shared print projects have become a much bigger phenomenon than we anticipated. Libraries have recognized that sharing both retention commitments and withdrawal opportunities lead to better results — even though shared decision-making can be time-consuming. It’s been interesting to see groups like the **Michigan Shared Print Initiative** and the **Central Iowa Collaborative Collections Initiative** emerge — groups that were formed specifically for the purpose of sharing print monograph collections. We expect to see more of that, and it provides a good balance of shared stewardship, followed by independent action that is based on the group’s retention commitments. That is, withdrawals take place only after retention commitments have been made.

And yes, there is still certainly (and understandably) resistance to reducing print book collections — it’s a difficult topic for most of us, even when it involves little-used surplus copies. That’s why it needs to be approached carefully, with the best information available. As a community, we need to make absolutely certain that we’ve protected sufficient print copies of everything to assure preservation and access. So today we’d amend that statement to “This is the Golden Age of Retention.”

ATG: *As print collections shrink and become less accessible there is growing concern about interlibrary loan services. This is especially true given the uncertainty about ILL and eBooks. Is the concern justified? Or is ILL unnecessary in today’s digital world?*

RL/RF: Print retains a very powerful appeal, even to undergraduates. In virtually all the projects SCS has worked to date, withdrawal decisions have factored in the proximity of a print copy, especially within a trusted delivery network. That’s what matters — how quickly could I get this in print? So ILL and direct borrowing arrangements will continue to play a central role in the management of

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OCLC/Sustainable Collection Services

Corporate Headquarters:
6565 Kilgour Place, Dublin, OH 43017
Phone: (603) 746-5991 • Fax: (603) 746-6052
<https://www.oclc.org/sustainable-collections.en.html>

OFFICERS: Rick Lugg, Executive Director.

KEY PRODUCTS AND SERVICES: Data management, decision-support, and consulting for managing print monograph collections: retention, storage, shared print programs, weeding, and preservation. Creator of **GreenGlass** and **GreenGlass for Groups (G3)** software.

CORE MARKETS/CLIENTELE: Academic libraries and consortia.

NUMBER OF EMPLOYEES: Four, supported by our colleagues at **OCLC!** 🐼

shared print collections. It’s fascinating how quickly a discussion about withdrawal turns into a discussion about discovery and delivery.

ATG: *Perhaps there is a more fundamental question we should ask. Are print collections becoming unnecessary? Do they have a future? If so, what is it? Do you see monograph collections being dominated by eBooks in the 21st-century library?*

RL/RF: Our view is that print book collections remain a vital component of library services. They may need to be managed differently, but print books are not going to disappear from libraries any time soon. Locally-held print collections may get smaller as libraries wrestle with space issues. But smaller local collections can be supplemented by rapid delivery of books from storage or from the collections of other libraries. The eBook question is interesting. To date, we have not had a single project where a print volume was withdrawn because an eBook was owned. People are still more interested in how close the nearest print holding is. eBooks will certainly play a big role in the 21st-century library, but at least where we’re working, dominance appears a long way off.

ATG: *If we were to look into a crystal ball, what would we see as the next “big thing” for library collections?*

RL/RF: Collection development evolved into collection management, which is now evolving into collection strategy. We’d suggest that a core component of collections work now involves “curating a discovery layer.” Rather than assembling resources locally just

in case users want them, the library populates its discovery layer with an even wider range of resources that are potentially useful, and then delivers them when and as needed. **Jacob Nadal** of **ReCAP** had an even more evocative phrase for this in a presentation we saw recently: “curated local experiences, drawn from a global supply chain.”

ATG: *With such a big change in your professional life, it’s important to maximize your down time. When we last interviewed you in March 2012, spending time with extended family was big for both of you. We assume that it’s still top on your list. Are there other activities that help you relax and recharge your batteries?*

RL/RF: A couple of years ago, we started a band with some friends (including **David Swords**, whom many readers will know). The **Luggnuts** play what **Gram Parsons** called “cosmic American music” — a few well-known tunes, covers so obscure they may as well be originals, and some actual original songs by **Rick** and **David**. It’s hard to think about anything else when you’re trying to get a song right, so it’s liberating. Plus we have a great motto: **The Luggnuts**: “We’re better than we sound.”

ATG: *Rick and Ruth, we realize how busy you are with this new venture and really appreciate you taking the time from your schedule to talk to us.*

RL/RF: Our pleasure. Thank you. 🐼