

CURL Annual Report, August 1996 / July 1997

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Mission statement

CURL's mission is "to promote, maintain and improve library resources for research in universities"

Vision

By the end of the year 2000, CURL will have consolidated its consortium partnership

- providing strong leadership and opportunities for innovation for the scholarly library and research communities
- providing the academic research community with physical and virtual access to the shared resources of all the CURL libraries
- providing a framework of mutual support, enabling its members to develop individual and collective strengths
- raising the profile of CURL and its members in appropriate fora, to ensure an understanding of the value of the research libraries to the national and international research community

Chairman's Introduction

I am delighted to have the opportunity of introducing this annual report, which marks an important stage in CURL's development. The year under review has seen an expansion of CURL's membership, which now numbers twenty six institutions. The CURL database, and the COPAC service which derives from it, continues to underpin CURL's consortial activities, but the database is by no means the sole focus for CURL. Among new collaborative initiatives that have taken place over the past year have been a CURL monograph interlending trial, a CURL study tour to the United States for interlending staff, and the forging of closer links with the Research Libraries Group (RLG) and the CIC.

Work on developing CURL's new strategic plan dominated our work in the second half of the year. I believe the plan will provide us with a clear direction for our strategic priorities, and will enable us to move forward, not only in those areas where the CURL institutions have been accustomed to collaborate, but also in new spheres of activity. As might be expected, within a consortium environment, the plan evolved through a process of consultation and iteration, and I am grateful to all the CURL members who contributed to this process.

Research libraries are facing some major challenges as they move into the next century. We must be sensitive to the continuing need to collect, preserve and make accessible information in traditional format, while at the same time being willing to embrace the opportunities that new technology presents. We will need to be enterprising and imaginative in meeting these challenges. CURL's partnership will provide us with a sound framework of support and will enable us to achieve collectively more than we can hope to do individually.

Company Business

Changes in the structure of the CURL Board and the management of CURL business

Following recommendations made by the then Directors, at their meeting in June 1996, a special resolution was passed at the Annual General Meeting, to reduce the number of Directors to eight. Nominations were invited for membership of the new Board of Directors, with nominations received being equal to the number of seats on the Board. The Board elected Peter Fox to serve as Chairman. From April 1997 the Board of Directors replaced the Management Committee as the group responsible for overseeing the management of CURL business. Meetings of the full membership continued to be held, with two meetings a year being scheduled on a regular basis.

Move of Secretariat from Leeds to London

To assist in the changes that were envisaged in the management of CURL business, a newly created post of Executive Secretary was advertised early in the year. Clare Jenkins was appointed to the post, and took up her new duties in February. It was agreed that the CURL Secretariat should move to London, and the BLPES kindly offered to house the Secretariat within the library at LSE.

Strategic Plan

With all the changes that had taken place, it was timely that CURL should review its strategic direction. The CURL meeting in March 1977 (the first of the new-style member's meetings) focused on what members believed should be CURL's strategic goals for over the next three years and from this meeting there emerged a draft strategic plan. A consultation period followed, during the summer months, with modifications being made to the plan in the light of members' comments, and by the end of the reporting year a draft was ready to be taken to the members' meeting in September 1997 for ratification and formal adoption. Under this plan, CURL has identified five key areas on which to focus its attention: Resource description and discovery; Access to CURL resources; Resource management; Raising awareness; and Membership services.

The year's highlights

Resource description and discovery

The database

The CURL database, and the COPAC service that has been developed from it, continued to be one of CURL's primary activities. The Database Management Committee, chaired by Clive Field, has been instrumental in identifying priorities and setting tight, but realisable goals. The working relationship between CURL and staff at Manchester Computing has been cemented, and regular visits to Manchester by Anne Mealia, the CURL Database Officer, have undoubtedly been a major factor in this respect.

The addition of more libraries' data to the database remains the current priority. 1996-7 saw the addition of the holdings of Imperial College, the University of London, Nottingham, and University College London. Data loading is running according to schedule, and we expect that all the remaining CURL libraries will have been added to the database, and to COPAC, by the end of 1998.

COPAC

Use of the COPAC service grew steadily over the course of the year, and the total number searches on the Web in 1996-7 was nearly six times higher than in the previous year.

The COPAC Policy Group continued to provide ongoing support and infusion of ideas for the development of the COPAC service, and CURL is grateful to them for this valuable contribution.

A first-stage evaluation of the COPAC service was carried out in October by the Department of Information and Library Management, University of Northumbria. Its findings showed that COPAC was viewed favourably by those who use it, but that publicity about the service needed to be improved to promote awareness among other potential users. The report also made recommendations about improvements to the user interface. There was a recognition that the Northumbria evaluation had been a brief and preliminary investigation, and it was recommended that a further, more detailed study should be commissioned in due course.

A bid for funding, submitted to JISC by the COPAC Project team and CURL, was successful, and the Tavistock Institute was awarded the contract, through a limited tendering process, to carry out a second stage evaluation in the autumn of 1997.

Technological developments have included a Z39.50 target for COPAC, and work is underway on a Z39.50 interface to the CURL database for record retrieval purposes.

Strategic issues for future development of the database

A number of strategic issues have been brought to light over the course of the year, some as a result of technological change, others through increased user expectations. They include the potential application of Z39.50 technology, and its implications for the longer term development of the CURL/COPAC databases; the availability of dynamic location information; and issues surrounding harmonisation of UK/US MARC, particularly given the growing trend for UK libraries to adopt US MARC when they migrate to the next generation of library systems. The CURL monograph interlending trial also highlighted some deficiencies in COPAC, if it is to be used as an interlending tool, and these, too, will need to be considered over the coming year.

Access to CURL resources

ILL monograph trial

A pilot scheme for monograph interlending was launched in April 1997 for a period of six months. Six CURL libraries participated as lenders and borrowers (Cambridge, Edinburgh, Glasgow, Leeds, Oxford and Trinity College Dublin and a further three CURL libraries (Birmingham, Manchester, Sheffield) and one non-CURL library (Lancaster) participated as borrowers only. The aim of the project was to establish the feasibility of developing a monograph interlending service, based on COPAC. Jacqui Dowd, from Glasgow University Library was seconded to the project as project officer.

The trial was not without its problems. Technical difficulties arose for some over the use of email as the primary means of communication, and the lack of location information on COPAC meant that the availability of an item at the point of request could not be confirmed unless further catalogue checks were made. Nevertheless, some valuable data has been collected, and the experiment has given some pointers on changes that will need to be made to the original methodology before a full interlending service can be introduced.

Heritage Lottery Fund

With help from an external consultant, CURL submitted an application, in May 1997, to the Heritage Lottery Fund, for funding for a feasibility study to see how access to CURL resources could be widened through a programme of retrospective conversion.

Resource Management

Guide to collections

The Guide to research collections of member libraries, ably edited by Oliver Pickering at Leeds, was published towards the end of 1996. The Guide provides a good overview of some of the collection strengths of the CURL libraries. By the time of its publication, however, CURL's membership had already expanded beyond the level represented in the Guide, and, if we are to produce a more up-to-date picture of the CURL resources, a new edition will be needed. Current thinking is that future editions should be published on the Web.

Raising awareness

CURL's contributions to wider national and international debate

During the course of the year CURL took part in the consultation process on a number of issues relating to libraries and their role in providing research support. Responses were sent to the British Library over charging policies and to the Department of National Heritage, in response to its consultation paper on Legal deposit. Members of the CURL Board also met with Michael Anderson to discuss the development of a national or regional strategy for library provision for researchers. Ideas that emerged during the course of this meeting fed into the deliberations of the Anderson Task Force.

International links

RLG

CURL's close links with RLG continued to be fostered by the presence of Nancy Elkington in the UK. Several CURL members attended the RLG Annual Meeting in Chicago in May 1997. This year saw the start of the one-year all-inclusive agreement between CURL and RLG, whereby, for a fixed fee, all CURL members were entitled to unlimited use of the RLG database for record retrieval plus public access through Eureka, for resource discovery. As is often the case in the first year of a new service, initial take up proved slower than had been hoped, and in the early months there were teething troubles with communication links and connection speed – problems which have now largely been resolved. As the year drew to a close, negotiations were underway between CURL and RLG to renew the arrangement, with minor modifications, for a second year.

RLG's new digitisation initiative, taking as its theme global immigration, was launched during the course of the year. Four CURL libraries – British Library, Liverpool, LSE, and the National Library of Wales all expressed interest in participating in the project, and all were successful in their bid to be included.

CIC

CURL members were present at a meeting with representatives from the CIC, hosted by JISC in Warwick at the end of April. We took the opportunity of the CIC visit to arrange a further meeting between CIC and CURL member representatives, following on immediately after the JISC meeting, to find out more about the way the CIC consortium operates, and to explore strategic issues that are of mutual interest.

Membership services

New members

Approval had been given, in June 1996, to applications for full membership from the Universities of Durham, Newcastle, Nottingham, Southampton and Warwick, and these were all formally received into membership in the autumn. Towards the end of 1996, the University of Liverpool and King's College, London became members, bringing the total number of full members to twenty. In addition, the Wellcome Institute joined as an Associate member, and SOAS as a co-operating member.

Site visits

The growth in membership prompted a series of site visits to new member libraries. Between October and December, Andrew Cooper and Nancy Elkington visited the libraries at Durham, Newcastle, Nottingham, Southampton and Warwick. Site visits were also made

by Clare Jenkins, Anne Mealia and Nancy Elkington to Liverpool and King's College London.

ILL Study Tour Visit to US libraries

During February 1997 members of CURL libraries were invited to participate in a Study Tour of RLG/SHARES member institutions in the US in order to visit the inter library loans departments and gain a better understanding of resource sharing practices in the US. Participants included members of the CURL ILL Working Party as well as members of the LAMDA board.

The Study Group visited the MINITEX service at the University of Minnesota in Minneapolis, Princeton, the State University of New York at Stony Brook, the University of Pennsylvania, the Philadelphia Museum of Art and the Library of Congress. The visit also included participation in an RLG International Task Force meeting, and the RLG SHARES Roundtable and RLG COLLECT meetings in Washington.

The visit was extremely useful in demonstrating the very different resource sharing culture which operates in the US and to provided the opportunity to observe some very interesting projects. The experience gained also highlighted some resource issues for the proposed CURL ILL trial (April-September 1997), and these were taken into account before the trial was launched.

OCLC

Discussions with OCLC over changes in the CURL/OCLC relationship were ongoing throughout the year. It had been hoped that these discussions would reach a satisfactory conclusion by the end of June, but in the event, this proved not to be possible. OCLC agreed to extend the existing CURL/OCLC agreement until the end of 1997.

Special Collections Group

The Special Collections group met twice during the year, at Edinburgh in October and at BLPES in April. Since the Group was set up in 1995 its meetings have provided members with the opportunity to visit other CURL libraries and to compare working practices.

Staff Development Group

The work of the Staff Development Group, chaired by Michael Hannon, culminated in a very successful conference, held in Sheffield in June. Attended by some seventy delegates, the conference provided subject librarians with an opportunity to exchange experiences with their peers in other CURL libraries. The Staff Development Group came away with an action plan that fed in to CURL's new strategic plan, and provided the Group with a full agenda for the coming year.

Wolfson Technology Resource Centres

Following CURL's successful bid to the Wolfson Foundation for funding to improve IT facilities, work was undertaken to make available Wolfson Technology Resource Centres in libraries at Cambridge, Birmingham, Edinburgh, Glasgow, Imperial College, Leeds, London School of Economics, Manchester, Sheffield, and University College London. CURL is very grateful to the Wolfson Foundation for its generous contribution of £450,000 to support the development of these resource centres. The newer CURL members were also given the opportunity to bid to Wolfson for funding under this initiative, and the Wolfson Foundation trustees are considering bids from four further CURL institutions.

People

Reg Carr relinquished the office of Honorary Secretary, which he held for five years, on the appointment of Clare Jenkins as Executive Secretary.

Andrew Cooper, who had served as CURL's Assistant Secretary, on secondment, between January 1994 and January 1997, reverted to a full-time post at Leeds in February.

Henry Heaney stood down as Chairman of CURL, after serving in this capacity for two years.

Brenda Moon retired from her post as Librarian at Edinburgh University in December 1996. Brenda was a founder member of CURL, and Chairman between December 1991 and November 1995. It was fitting that the last CURL meeting she attended should be held in Edinburgh, where all the CURL librarians were able to bid her farewell.

Elsewhere within the CURL membership we saw the retirement of David Vaisey from Oxford, and David Miller from Nottingham.

CURL is grateful to them all for the contribution they made to the work of the Consortium.

New librarians were appointed at four of the CURL libraries during the course of the year. Reg Carr moved from Leeds to Oxford, to take up the newly created post of Director of University Library Services and Bodley's Librarian; Ian Mowat moved from Newcastle to Edinburgh; Tom Graham left York to fill the vacancy at Newcastle; and Lynne Brindley succeeded Reg Carr as Dean of Information Strategy and Librarian, at Leeds

Membership

The twenty member institutions at 31 July 1997 were: the universities of Birmingham, Cambridge, Durham, Edinburgh, Glasgow, Leeds, Liverpool, London, Manchester, Newcastle, Nottingham, Oxford, Sheffield, Southampton, Warwick, and Imperial College London, King's College London, London School of Economics, University College London and Trinity College Dublin.

The British Library, the National Libraries of Scotland and Wales and the Wellcome Institute were Associate members of CURL. The School of Advanced Study and the School of Oriental and African Studies, both of the University of London were Co-operating Members.

Directors

Directors The Directors during the year were:

Dr Clive Field

Mr Peter Fox

Miss Brenda Moon (resigned 31.12.96)

Mr Henry Heaney (resigned 26.3.97)

Mr Reg Carr

Mrs Emma Robinson (resigned 26.3.97)

Mr Chris Hunt (resigned 26.3.97)
Mr David Vaisey (resigned 31.12.96)
Ms Magda Czigany (resigned 26.3.97)
Mr Frederick Friend
Ms Lynne Brindley
Mr William Simpson (resigned 26.3.97)
Mr Michael Hannon
Mr Bernard Naylor (appointed 1.9.96)
Dr John Hall (resigned 26.3.97)
Mr Ian Mowat (appointed 1.12.96 resigned 26.3.97)
Ms F Thomson (appointed 1.9.96)
Dr John Henshall (appointed 1.9.96 resigned 26.3.97)
Ms Anne Bell (appointed 18.2.97 resigned 26.3.97)
Mr Roger Davis (appointed 1.3.97 resigned 26.3.97)

Meetings of CURL

The Board of Directors met on the following occasions:

19 September 1996 - Sheffield

12 December 1996 - Edinburgh

26 March 1997 - Birmingham

The Management Committee (reconstituted as the Board of Directors after March 26 1997) met on:

18 September 1996 - Sheffield

11 December 1996 - BLPES

29 January 1997 - UCL

25 March 1997 - Birmingham

1 May 1997 - Warwick

28 May 1997 - BLPES

16 July 1997 - UCL

The Annual General Meeting

26 March 1997 - Birmingham

Summary statement of financial activities:

Year ended 31 July 1997

Unaudited

	1997	1996
	£	£
Income and expenditure		
Incoming resources		
Subscriptions	171,906	116,000
User charges	100,865	78,038
CURL guide	5,784	-
RLIN search charge	122,453	-
	<u>401,008</u>	<u>194,038</u>
Resources used		
Staff Costs	68,970	54,408
Administrative Costs	13,080 7,086	7,086
Membership activities	40,304	7,508
Database expenditure	267,294	162,466
	<u>389,648</u>	<u>231,468</u>
Net incoming (outgoing) re- sources for the year and net movement in funds	11,360	37,430
Balance brought forward at 1 August 1996	71,045	108,475
Balance carried forward at 31 July 1997	82,405	71,045

Glossary

BLPES British Library of Political and Economic Science

CIC Committee on Institutional Cooperation

COPAC **CURL** Online Public Access Catalogue

ILL Inter-library loans

JISC Joint Information Systems Committee

LAMDA London/Manchester Document Delivery

LSE London School of Economics

MARC MACHine Readable Cataloguing

OCLC Online Computer Library Center

RLG Research Libraries Group

RLIN Research Libraries Information Network

SOAS School of Oriental and African Studies (University of London)

UCL University College London

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