Value of Resource Sharing Ad Hoc Discussion Group – 2ⁿᵈ meeting

OCLC Suite, Omni Hotel, Atlanta, GA

Saturday, January 21, 2017 2:30-4pm ET

Notes and outcomes

*Participants: Emily Batista, University of Pennsylvania; *Patrick Carr, University of Connecticut; Peter Collins, University of Pennsylvania and Ivy Plus; Tom Delaney, Colorado State University and RapidILL; Megan Gaffney, University of Delaware; Krista Higham, Millersville University; *Zack Lane, Columbia University; David Larsen, University of Chicago; Micquel Little, Claremont Colleges; *Kurt Munson, Northwestern University; Matthew Sheehy, Brandeis University; Emily Stambaugh, California Digital Library; *Sydney Thompson, North Carolina State University; Dennis Massie, OCLC Research.*

*First-time participants

Outcomes – some rough ideas for measuring the value of resource sharing

1) Matthew: At Brandeis we did a citation study – where faculty published, what they cited, what portion of that material we had access to. Could we have supplied it? Next we listed what we don't have – compared with what we could have gotten. Our goal is to fill in the "access gap." We are now sharing this work with faculty and learning a lot, such as their choice to not use the best, but most accessible material. Also, we are learning more about the informal sharing network between peers.

2) Micquel: Connecting the dots for our patrons is a huge untapped opportunity. Rather than focusing on systems and exploring the lifecycle of the request, we should look at that of the learner.
3) Kurt: Many of our patrons are 1st generation immigrants or low-income. We get them economics textbooks. There is a story to tell here. There are strong correlations between students owning things and where they live in the city.
4) Bill: We borrow. But what would it cost to buy vs. borrow? How much did you spend on text books? None! ILL!
5) Krista: The value of joining a consortium. Consortial purchasing makes for cheaper shipping; we average $4 for up to a 30 pound ILL package.

Clues to areas of inquiry that could possibly lead to measuring value:

1) Zack: Shifting the idea of the library as pure non-profit to mitigate & redistribute long term costs. For example, how can access to legacy print in HD storage (ReCap) be monetized? Change mindset to lower costs for institutions committed to perpetual preservation & access; raise costs for institutions that do not.   Following on, how can cataloging dollars be allocated to provide maximum benefit for owning institution, consortia and larger scholarly community. Copy cataloging $5K. Original cataloging $1K. Does copy cataloging really have 5X value?
2) Emily B: Competing resource allocations. Does owning have more value than access? If you can get access, does the space have better value than owning materials?
3) Tom: Local campus, DD project means that fewer people need to come to the library, and also decreases staff time for shelving, etc.
4) Emily S: Paul Courant did a study of what it cost to keep a book on the shelf on campus as opposed to in offsite storage. Cost modeling raises question – and we can provide more efficient access from offsite storage. Are the numbers in the Courant study still right?
5) Emily B: Academic databases are not avail to alums. It would be too expensive to offer them continued access after graduation. Are there ways to measure this expense, which would help assign a value to such access?
6) Megan: Qualitative measurement is really important, like hosting interviews with people who used our services. Did they value what we provided and why?
7) Emily B: We need to support our value not just with numbers, which are important, but with human examples of how we make a difference to researchers, teaching faculty, and students. This is an area, like many in librarianship, where we must go beyond mere numbers because some of what we do is not easily quantifiable, but no less valuable, than more easily counted outcomes.

Notes

Dennis set the scene, walking through some "topics for today":

1) Quick review: Current landscape described in our previous conversation, June 2016 in Orlando:

A. Ease of access determines use.
B. What patrons value may vary.
C. Big net lending may not be sustainable or desirable.
D. Too many collaborative opportunities – which are essential?
E. Managed scarcity – fewer copies. Works for journals; will it work for other formats?
F. What effects do "access over ownership" collection strategy have on user behaviors and outputs?
G. POD will change publisher business strategies.
H. Can't improve institution if counting or measuring the wrong thing.
I. Value to patron determines value to the institution.
J. Resource sharing will become the steering mechanism for collection development and acquisitions.

2) Major themes emerging from our previous discussion:

A. Value to the patron is key.
B. We're moving from an information environment of abundance to managed scarcity.
C. Counting things is not enough.
D. Value of resource sharing can't be determined in a vacuum -- it is tied to collections and collaborations.

3) Two comments made by David during our previous discussion stand out and put the patron at the center of our ongoing discussions about the Value of Resource Sharing:

A. One could fruitfully explore how what patrons value (speed, convenience, efficiency, ease) determines whether resource sharing is ultimately perceived as valuable to the degree we are able to deliver what they value.
B. We lend in order to borrow. Patrons don't value lending; they value borrowing.

4) Some current approaches to measuring the value of resource sharing services include:

A. Measure use – ILL's, POD's.
B. Measure impact – GPA with library/ILL use; research outputs; grant funding attracted; interviews and surveys.
C. Put $ value on service offered/money saved.
D. Measure the number of volumes or e-resources to which consortia provide potential access.

5) Assessing the Value of Library Services has been a hot topic for at least a decade:

A. Ways of evaluating: most existing projects I looked at focus on sharing impact of public libraries. Others focused exclusively on the impact of undergraduate learning.

        B.   Some – such as <u>Libvalue</u> (IMLS-funded multi-phase project involving ARL, UIUC, Drexel, U of Tennessee, Syracuse), and <u>Edge</u> (public libraries) – provide toolkits for evaluating services.

        C.   Metrics for library value are currently based on:

            i.   Rankings

           ii.   scholarly outputs

          iii.   citations

          iv.   grant funding

           v.   stars on campus

          vi.   retention of faculty and students

        D.   How does ILL fit in here?

6)   What can we do?

Open discussion

Matthew: We need to get what we do not have, but owning or immediate access is often an important part of recruiting good faculty. While as academic institutions we collaborate, we are not altruistic. We compete for students, grants, resources, faculty… How do we design a study that shows value while not undermining or "exposing" institutional weaknesses?

Peter: It can be difficult for the library to demonstrate how we contribute to scholarship on campus. How do we make that link more obvious? We know that resource sharing supports research, course completion, and publishing, but it this is usually a one-way street: we provide information on demand but don't see the final result, the contribution of that material to the final product.

Emily B: Value is difficult to measure. Hard especially in the short term.

Kurt: There's a wide variety of populations we're serving. An undergrad is different from a PhD or ABD. New faculty is tenure-track and established faculty have tenure. The needs of each are radically different.

Megan: Resource sharing activity can give us good data beyond patron status and "who is requesting what" if we look at call numbers/subject headings. Borrowing data can show where we're not adequately collecting in new faculty or graduate students' discipline.

Matthew: At Brandeis we did a citation study – where faculty published, what they cited, what portion of that material we had access to. Could we have supplied it? Next we listed what we don't have – compared with what we could have gotten. Our goal is to fill in the "access gap." We are now sharing this work with faculty and learning a lot, such as their choice to not use the best, but most accessible material. Also, we are learning more about the informal sharing network between peers. Brandeis faculty have joint appointments or colleagues and they ask for articles from peers sometimes before ILL. Are the barriers still too high? Or is this a social behavior that reinforces collaboration and not something to sorry about?

Emily S: ARL's depend upon others. Shared print agreements are a sign of success. But access teams will be put to the test. We're waiting for infrastructure to be put in place to properly disclose and manage retention and access agreements. What will access to shared retained collections look like? Dim archives are not what's needed. We must light up those places where copies are being retained.

Zack: Shifting the idea of the library as pure non-profit to mitigate & redistribute long term costs. For example, how can access to legacy print in HD storage (ReCap) be monetized? Change mindset to lower costs for institutions committed to perpetual preservation & access; raise costs for institutions that do not.   Following on, how can cataloging dollars be allocated to provide maximum benefit for owning institution, consortia and larger scholarly community. Copy cataloging $5K. Original cataloging $1K. Does copy cataloging really have 5X value?

Emily B: Competing resource allocations. Does owning have more value than access? If you can get access, does the space have better value than owning materials?

Emily S: Cataloging values are changing. Who has time to produce perfect records? Anything in a backlog is inaccessible. There is an increasing focus on original cataloging. Other stuff is already discoverable. We will never have enough resources. We must find a balance in how we spend our assets – on cataloging, on space, etc.

Tom: When the CSU flood happened, we never had to close ILL access because we had a portable department. Local campus, DD project means that fewer people need to come to the library, and also decreases staff time for shelving, etc.

Peter: Scan and deliver gives us data about what our users need from our own collections. Does paging and scan and delivery tell us something that traditional circulation numbers or "in library use" of journals doesn't?

Matthew: Perhaps there is an opportunity for a service offering by libraries, where they correct incomplete or poor citations for patrons?

Emily S: Paul Courant did a study of what it cost to keep a book on the shelf on campus as opposed to in offsite storage. Cost modeling raises question – and we can provide more efficient access from offsite storage. Are the numbers in the Courant study still right?

Zack: Build an equation to calculate the costs of various forms of access: shelve/retrieve on campus, shelve/retrieve remotely, etc.

Micquel: Connecting the dots for our patrons is a huge untapped opportunity. Rather than focusing on systems and exploring the lifecycle of the request, we should look at that of the learner. Resource sharing is one of the main services that connect academic and public libraries. Are we connecting the student with our value after they leave the academy? Are they aware of their access through libraries around the world after they walk across the stage (or even before)? There are also interesting information literacy opportunities in our workflows if we focus on the patrons and the people behind the service – requests do not have to be black and white, yes or no, transactions.

Matthew: A retention commitment on a last copy in a small public library that is not climate controlled is not a preservation strategy. We work with a distributed model – copies can be on-shelf and circulate, but do we know the risks? What would be the cost to retain a last copy in a secure climate controlled

environment? Would we then be counting on ARLs to do the work of preserving our cultural heritage? We already know there are unique material not held by ARLs so how do the pieces fit together? How do we incorporate public libraries which also have many unique materials in their collections? How do we equitable share the resources and costs?

Megan: ARL statistics are still important, even to university staff outside the library. We have a new University President, and he's made reference to where we are in the ARL rankings.

Matthew: As collaborations like EAST become bigger than our past collaborations like the Boston Library Consortium, when would we stay members of the smaller groups?

Peter: What we count – shared collections – 3 years ago we configured BorrowDirect to record whether an item requested is owned by ordering institution (checked out, non-circ, etc). 50% of all requests are already owned by the patron's library but the copy wasn't available at time of requesting.

Peter: We rely on redundancy. 65% of Harvard requests are for thing they already own. BorrowDirect requests are a mix of unique holdings and high demand items.

Emily B: Traditional ILL is expensive. BorrowDirect is so cost-effective that it allows you to relax restrictive policies.

Peter: Floating collection? How would we manage? We could use existing BorrowDirect infrastructure, which creates temporary circulation records at the borrowing library. Currently those records are suppressed from public view. But if the record was exposed, the availability logic could key off of that item to enable fulfillment of a subsequent request without requiring that the item be returned to the owning library (BorrowDirect would be the system of record). Instead of a hub-and-spoke network, we would have a web.

Zack: Assess – what would be the commercial cost of accessing a database that you have free access to as a student or faculty? After graduating, alums would have to purchase.

Emily B: Right, academic databases are not avail to alums. It would be too expensive to offer them continued access after graduation. Are there ways to measure this expense, which would help assign a value to such access?

Matthew: Mark Paris (Brandeis assessment librarian) has shown that most of what we request we do not need to be a member of SHARES, but what SHARES brings is other value. Value in community and discussions like the one we are having. Discussion around best practices and sharing special collections. Value is more than cost per transaction or overall access.

Megan: Qualitative measurement is really important, like hosting interviews with people who used our services. Did they value what we provided and why?

Kurt: We count things, and we count the people. Are we counting the right things? What do the numbers mean when we're done counting? We may know that we supplied 2000 items to our borrowers, but what do we really know? "Did this help you?" We usually have no clue.

Emily B: We need to support our value not just with numbers, which are important, but with human examples of how we make a difference to researchers, teaching faculty, and students.

Zack: I am increasingly aware of rates and populations when analyzing transactional data. It's necessary to monitor population sizes of user groups and distinguish between low, high and non-users. Search for links and common elements between data sets/services/collections.

Emily B: This is an area, like many in librarianship, where we must go beyond mere numbers because some of what we do is not easily quantifiable, but no less valuable, than more easily counted outcomes.

David: I like the emphasis on stories. Too often libraries have sought to demonstrate their "value" through Return on Investment (ROI) studies that seem reductionist and overly focused on economic value rather than on our transcendent Values. They look for tangible goods rather than the intangible Good that we provide. For example, the ARL LibValue project sought to show that economic investments in libraries correlate with greater grant income. I find the ACRL Value of Academic Libraries approach more compelling because it focused on documenting and demonstrating the impact that libraries have on those they serve (e.g.,by fostering student retention or promoting student success.) We need to collect and tell the stories of how the material we obtain for our users transforms their studies or allows them to succeed as researchers.

Bill: We often borrow as a first resort. What would it cost to buy vs. borrow?

Kurt: Many of our patrons are 1st generation immigrants or low-income. We get them economics textbooks. There is a story to tell here. There are strong correlations between students owning things and where they live in the city.

Krista: Millersville has been a net borrower for years. Now it's flipped, and we're a net lender. Trend to be borrowing less books. The value of joining a consortium. Consortial purchasing makes for cheaper shipping; we average $4 for up to a 30 pound ILL package.

Tom: We need to measure our success in context of the entire user population.

Bill Jones: How much did you spend on text books? None! ILL!