Collection Development Panel: ILL Statistics Informing Collection Development
Tina Baich
Head, Resource Sharing & Delivery Services
IUPUI University Library
Krista Higham
Access Services Librarian
Millersville University

Kari Anderson
Collection Development Team Lead
National Defense University
ILL Data Analysis Informing Collection Development Decisions

ORLA MEJIA, RUTGERS UNIVERSITY
Orla Mejia
Lending Coordinator, Interlibrary Loan Services
Rutgers University
Extracting and Organizing the Data
The Task Force

• Formed to analyze rising ILL copyright fees
• Collection Managers, ILL staff and Technical Services staff
• Prompted by the merger of legacy libraries and 2 health services libraries
• Fees no longer being passed on to patron (threshold reduced, then eliminated)
• Provided the opportunity to analyze our holdings and resources
The Data

- Extracted 2 year borrowing activity from ILLiad
- Data organized to highlight the 50 most requested journal titles
  - Archive (1993 and earlier)
  - Recent (1994-2008)
  - Current (2009 – present)
- A separate file to analyze cancelled requests
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Request Patterns & Copyright Fees

• Consider the dates of the request:
  – many requests for one article or one journal title in a short time period
  – requests spread out over a much longer period of time

• These variables would be evaluated differently when considering the appropriateness of an ongoing subscription or other methods to obtain the article.
# Request Patterns & Copyright Fees

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*Notes:* 4: Requested throughout the year by many users
3: Requested throughout the year by many users
0: Requested throughout the year by many users
33: Majority of requests at the beginning of the year
2: Requested throughout the year by many users
0: 2014, same user placed many requests
3: Requested throughout the year by many users
2: Requested throughout the year by many users
6: Requested throughout the year by many users
3: Requested by many users 80% of the time at the beginning of the year
0: Requested mostly at the beginning of the year by many users
1: Requested throughout the year by many users
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What Else?

• We found that so much more could be gleaned from the data used in this analysis:
  – Top titles requested by broad discipline
  – Who is requesting ILL?
  – The origin of the ILL request
Top Titles Requested by Broad Discipline

- Humanities: 2%
- Science: 39%
- Social Science: 59%

Where do Requests Originate?

- EBSCO: 62%
- Scopus/SD: 5%
- ProQ: 4%
- WOK: 6%
- Ovid: 10%
- CAS: 2%
- Pubmed: 11%

Who is Requesting ILL?

- Graduate: 39%
- Undergrad: 23%
- Unidentified: 22%
- Faculty: 16%
- Other, guest, visiting scholar: 0%
What Next?

• Ongoing analysis to monitor costs and advise collection management
  – Search criteria saved in ILLiad
  – Data produced every 6 months

• Departmental restructuring
  – ILS is no longer part of Access Services Department
  – Now part of Collection Services and Resource Sharing
David Ketchum
Head, Access Services
University of Oregon Libraries
Enhancing Our Approach: Utilizing Resource Sharing Data for Intentional Collection Development
UO Libraries Collection Managers Group

• Fund allocations
• Collections budgeting
• Subscription acquisition and renewal
• Collection development policies
• Collection analysis
• Etc.
And

- [Transactions.CreationDate] Is between 1/1/2017 and 1/31/2017
- [Transactions.ProcessType] Equals Borrowing
- [Transactions.RequestType] Equals Article
- [Transactions.PhotoJournalYear] Is greater than or equal to 2012

Or

- [Transactions.TransactionStatus] Equals Request Finished
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**Sharing Breakthroughs**

2017 OHSU RESEARCH EXHIBITION

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Sample Serials Review Report

February 2017

Journal of Developmental and Physical Disabilities, ISSN: 1056-263X (Print) 1573-3580 (Online)

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<th>Year</th>
<th>Total Requests</th>
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Examples, Fund Allocation Formulas

Here are some of the formulas that the UO Libraries has tested:

(Book$ * FTE * Total Checkout) $\rightarrow$ % of Total Budget * Available funds

(Books$ * Serials$ * FTE * Total Checkout) $\rightarrow$ % of Total Budget * Available funds

(Book$ * Serials$ * Faculty FTE * Total Checkout * Avg PhDs awarded) $\rightarrow$ % of Total Budget * Available Funds

(Book$ * Paid Faculty FTE * (Faculty FTE/PhDs awarded)) $\rightarrow$ % of Total budget * Available Funds
## Departmental Borrowing-to-FTE Ratio

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<tr>
<th>A</th>
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<tr>
<td>3. Psychology</td>
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<td>1281</td>
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<td>4. Human Physiology</td>
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<td>7. Other</td>
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<td>8. Romance Languages</td>
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<td>56/FTE</td>
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ILL Purchase on Demand

1. Requesters/Patrons
   a. Faculty and graduate students
   b. Patron indicates desire to have the item purchased before submitting a request to Acquisitions

2. Price Limit
   a. $200 or less

3. Material Types
   a. Monographs
   b. AV (DVDs and CDs only)
   c. Academic in nature

4. Conditions/Limitations
   a. No textbooks, continuing publications, scores, electronic material, devices, etc.
   b. English language only; non-English language material will be considered on a case-by-case basis by the RS Librarian (use the Note to RS Librarian template)
   c. RS would incur a fee above the normal subsidy
   d. RS cannot find a possible supplier, or borrowing would require going outside of OCLC (ALA Request Processing)
   e. Material is not owned by three or more Summit libraries
   f. Publication date is 2000 or after
Krista Higham
Access Services Librarian
Millersville University
Maintain, Cancel, Reduce, or Expand: Using ILL data for collection decisions
Millersville University Library

- Collection Development Committee (current makeup):
  - Four librarians:
    - Access Services Librarian (chair)
    - Information Systems/Discovery Librarian
    - Education Librarian
    - Reference Librarian
  - Acquisitions Technician
Resource / Database Renewals

• Committee reviews nearly all resources and databases for renewal each year
  – Cost per download
  – Availability via other avenues (document delivery)
  – If use is down we check URLs and Linking for technical issues
Criteria

• It sort of depends
  – General use subscription should be under $5/use
  – Multidisciplinary should be under $25/use
  – Single discipline should be under $40/use

• Needed for accreditation
  – Sometimes this is more fluid than you think

• Criteria slightly different for audio and video
Results

• Have cancelled or moved to electronic most paper subscriptions – only five remain
• Have cancelled several single title electronic serial subscriptions
• Have cancelled a few small packages (Physics, Anthropology, Engineering)
• Have moved to smaller packages or fewer title sets
Expanding or upgrading packages

- CINAHL Complete - expanded
- Medline Complete - expanded
- EBSCO Ultimates – wait and see
- JSTOR Business IV – decided not to subscribe
- Emerald – temporarily expanded
Alternatives

• Considering unmediated CCC Get It Now for some packages – IEEE Digital Library
• Mediated Get It Now
• Wiley tokens
• Reprints Desk
Conclusions

• This can be an ad-hoc process
• Doesn’t need to be hugely time-consuming
• Can still provide your users with timely service even after cancelling a subscription
• Keeps your collection from stagnating
• For those on a tight budget – this is the new way-of-life
Kari Anderson
Collection Development Team Lead
National Defense University
Informing Selection
National Defense University

NDU is an internationally recognized graduate-level university with five colleges and multiple centers of excellence focused on joint education, leader development, and scholarship in national security matters.

Our Mission

NDU develops joint warfighters and other national security leaders through rigorous academics, research and engagement to serve the common defense.

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Academics

Colleges & Centers
- CAPSTONE
- Center for Applied Strategic Learning (CASL)
- Center for Joint and Strategic Logistics (CJSL)
- Center for the Study of Weapons of Mass Destruction (WMD Center)
- College of International Security Affairs (CISA)
- The Dwight D. Eisenhower School for National Security and Resource Strategy (formerly the Industrial College of the Armed Forces)
- Information Resources Management College (iCollege)
- The Institute for National Security Ethics and Leadership (INSEL)
- Joint Forces Staff College (JFSC)
- KEYSTONE
- National War College (NWC)
- PINNACLE
- Reserve Components National Security Course (RCNSC)
To Buy or Not to Buy?

- Analyze daily holds requests
- Analyze interlibrary loan requests
- Analyze purchase requests
Subscribe or Borrow?

- Average cost of a journal article calculated from monthly ILL reports
- Average cost to borrow x number of requests from a title = decision to renew or not
Food for Thought, and Action:

• What else can the statistics tell us?
• How important is it?
Questions?

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kari.anderson@ndu.edu