

Sharing Breakthroughs

2017 OCLC RESOURCE SHARING
CONFERENCE

The ILL Cost Calculator: a New Tool “By, Of and For” the ILL Community

DENNIS MASSIE, OCLC



Dennis Massie

Program Officer, OCLC Research

Who

Beta Testers – October 2015-present

- Margarita Moreno, National Library of Australia
- Megan Gaffney, University of Delaware
- Justin Hill, Temple University
- Lars Leon, University of Kansas
- Brian Miller, The Ohio State University
- David Larsen, University of Chicago
- Jenny Lee, University of California, Los Angeles
- Ronald Figueroa, Syracuse University
- Matthew Sheehy, Brandeis University
- Josh Steans, University of Wisconsin-Stout
- Don Pawl, University of Colorado at Colorado Springs

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Why

Where is the fresh ILL cost data?



\$9.62/\$3.93
(23 responses)



\$17.50/\$9.27
(72 responses)

Old Apples vs New Oranges

- 2002
 - Filled requests only
 - Selective tracking of unmediated methods
- 2011
 - Filled and unfilled
 - No tracking of mediated vs unmediated
- Meanwhile:
 - Libraries are now lending from electronic holdings
 - Print items are being loaned directly from offsite storage
 - Many new methods, models, and technologies have emerged

2002

2002





2002



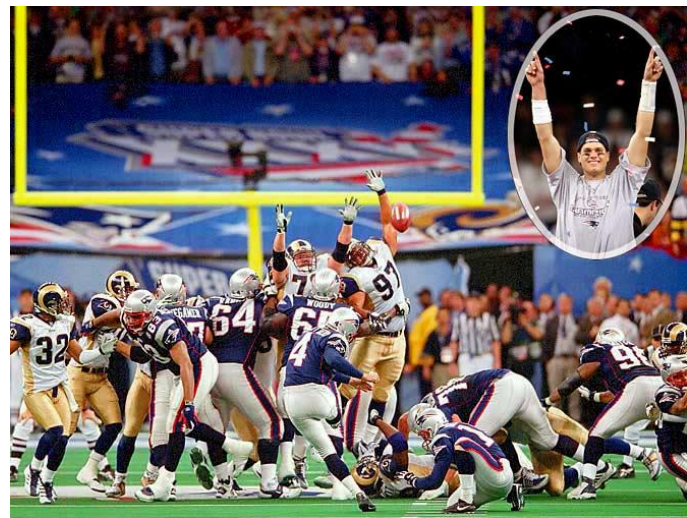


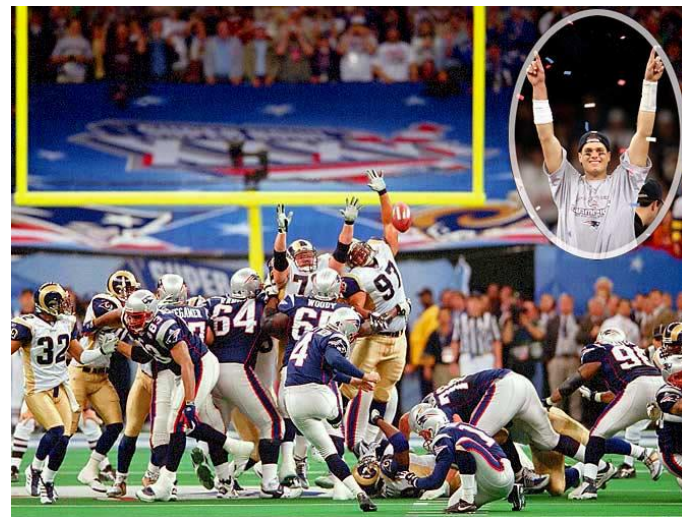
2002

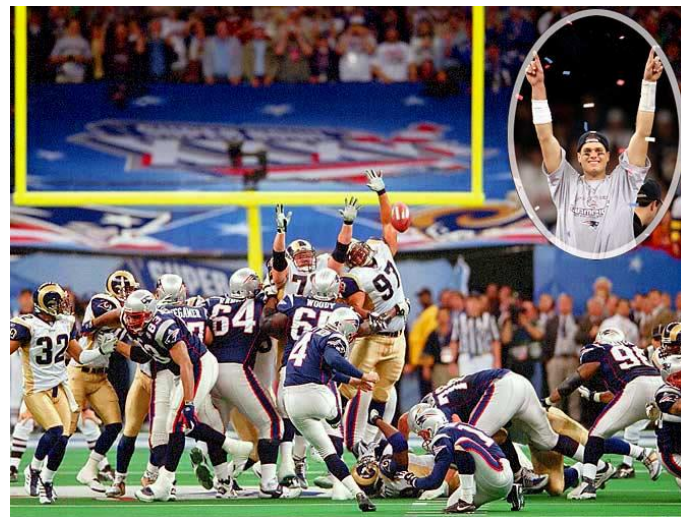


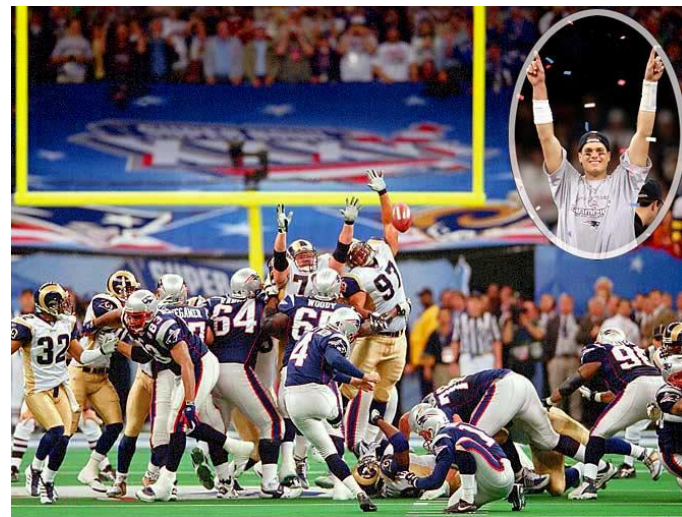


2002









What

Use Cases

- Users want to *know*:
 - Their resource sharing unit costs
 - How those costs evolve over time
 - How their costs compare with peers
- Users would like to *project*:
 - The financial impact of automating a process
 - Of buying a high-end scanner
 - Of implementing a new local DocDel service

Reports

- High-level average costs – public reports
 - Detailed costs
 - What-if scenarios
- } privileged reports

*Only those who contribute data can access advanced reports and custom query functions.

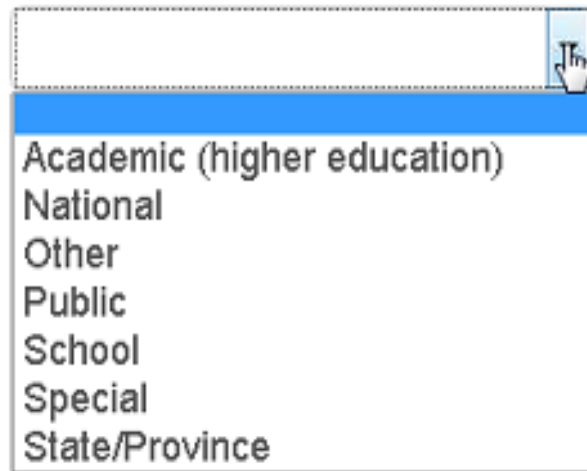
Recent issues tackled by the Betas

- Should we count delivering own stuff to own patrons?
- What about costs that we simply can't come up with?
- What about sensitive costs, or costs covered by confidentiality agreements?

How

Primary and Secondary Library Types

Primary Library Type



Academic (higher education)
National
Other
Public
School
Special
State/Province

Secondary Library Types (Check as many as apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> ARL | <input type="checkbox"/> Education | <input type="checkbox"/> Medical |
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Engineering | <input type="checkbox"/> Museum |
| <input type="checkbox"/> Archives | <input type="checkbox"/> Government | <input type="checkbox"/> Music |
| <input type="checkbox"/> Art | <input type="checkbox"/> Health services | <input type="checkbox"/> National |
| <input type="checkbox"/> Bookmobile | <input type="checkbox"/> History | <input type="checkbox"/> Nursing |
| <input type="checkbox"/> Branch | <input type="checkbox"/> Hospital | <input checked="" type="checkbox"/> Research |
| <input type="checkbox"/> Correctional Facility | <input type="checkbox"/> Industrial/commercial | <input type="checkbox"/> Vendor |
| <input type="checkbox"/> Dental | <input type="checkbox"/> Law | <input type="checkbox"/> Veterinary |
| | <input type="checkbox"/> Main | |

Indicating Which Data Points You Cannot Provide

Place an X in the box next to any costs or cost breakdowns that you will be unable to provide.

In your comparison reports with anonymized peers, these costs will be subtracted from the comparisons

If there is sufficient data, the proportion that such costs represent for your peers will be indicated.

<input type="checkbox"/>	Request Movers
<input type="checkbox"/>	Consortial Borrowing Systems
<input type="checkbox"/>	Request Managers
<input type="checkbox"/>	Copies/loans breakdown
<input type="checkbox"/>	Unfilled
<input type="checkbox"/>	Staffing cost
<input type="checkbox"/>	Staff fringe benefits
<input type="checkbox"/>	Staff category breakdown
<input type="checkbox"/>	Supervisor/manager breakdown
<input type="checkbox"/>	Staff costs outside department
<input type="checkbox"/>	Staff costs outside division
<input type="checkbox"/>	Staff percentages for each task
<input type="checkbox"/>	Equipment costs
<input type="checkbox"/>	Shipping costs
<input type="checkbox"/>	Courier costs
<input type="checkbox"/>	Postal costs
<input type="checkbox"/>	Consortial Dues costs
<input type="checkbox"/>	Borrowing fees
<input type="checkbox"/>	Reimbursements
<input type="checkbox"/>	Other (explain - type over)
<input type="checkbox"/>	Other (explain - type over)

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	Request Movers
	Consortial Borrowing Systems
	Request Managers
	Requisitions breakdown
	Unfilled
	Staging cost
	Staff fringe benefits
	Staff category breakdown
	Supervisor/manager breakdown
	Staff costs outside department
	Staff costs outside division
	Staff percentages for each task
	Equipment costs
	Shipping costs
	Courier costs
	Postal costs
	Consortial Dues costs
	Borrowing fees
	Reimbursements
	Other (explain - type over)
	Other (explain - type over)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	We've divided up the collection-sharing systems based on the main function that each serves.																	
2	<p>Read Me:</p> <p>Some systems are Request Movers that cause transactional messages to move back and forth between borrowing and lending libraries. Examples include WorldShare ILL, RapidILL, Relais, and others. Indicate every Request Mover that you use by noting its annual cost and recording the number of each type of transaction that passes through that Request Mover. Recording the names of your Request Movers in the Notesfield, Column S, is optional.</p> <p>Request movers</p> <p>(traditional ILL)</p> <p>(discovery typically via a virtual aggregation of local catalogs)</p> <p>(See instructions, p. 9-10)</p>	Category	Category Detail	Yearly Expense	As Request or Filled Copies	As Request or Unfilled Copies	As Request or Filled Loans	As Request or Unfilled Loans	As Supplier Filled Copies	As Supplier Unfilled Copies	As Supplier Filled Loans	As Supplier Unfilled Loans	Provider from own collection on to own patrons, Filled	Provider from own collection on to own patrons, Unfilled	As DD Provider from own collection on to own patrons, Filled	As DD Provider from own collection on to own patrons, Unfilled		
3		Mover #1																
4		Mover #2																
5		Mover #3																
6		Mover #4																
7		Mover #5																
8																		
9																		
10																		
11																		
12																		
13																		
14	<p>Read Me:</p> <p>Some systems support a model of collection sharing known variously as Consortial Borrowing, or Circ-to-Circ, or Expanded Circulation. Examples include Relais D2D, WorldCat Navigator, INN-Resch, and others. Some use a hybrid model with a front-end from one vendor and a back-end by another. In Section 2, indicate every Consortial Borrowing system that you use by noting its annual cost and recording the number of each type of transaction that passes through that Consortial Borrowing system. NOTE: If you use a hybrid set-up (Such as the Relais D2D front end and then ILLiad as the back end) record your costs and transactions number in the Hybrid row. See Instructions, p.10 and pp.25-26, for guidance on recording.</p> <p>Consortial borrowing</p> <p>(Circ-to-circ) or (discovery typically via a virtual aggregation of local catalogs)</p> <p>(See instructions, p. 10)</p>	CB system #1																
15		Hybrid CB system																
16		CB system #2																
17		CB system #3																
18		CB system #4																
19																		
20																		
21																		
22																		
23																		
24																		
25																		
26		Consort. Borr. Totals:		0	0	0	0	0	0	0	0	0	0	0	0	0		
27	<p>Read Me:</p> <p>Many libraries manage their Request Movers (and sometimes their Consortial Borrowing systems) through a single interface, using a Request Manager. Examples include ILLiad, Relais, and Clio. In Section 3, indicate which Request Manager you use by noting its annual cost. Next, in Column C above, place an X next to each Request Mover or Consortial Borrowing system managed through your Request Manager's interface. (Note: If you use more than one Request Manager, type a 1 or a 2 instead of an X in Column C next to each Request Mover or Consortial Borrowing system managed by one of your Request Manager's.) Indicate the number of each type of transaction that you send and receive through the Document Delivery module of your Request Manager. Also, note the total of unfilled requests you have for each type of request overall, across all Request Managers.</p> <p>Request managers</p> <p>Manager #1</p>	Hosting	Licensing fee	\$ -														
28		Manager #2			\$ -													
29		Manager #3			\$ -													
30					\$ -													
31					\$ -													
32					\$ -													
33					\$ -													
34					\$ -													
35					\$ -													
36					\$ -													
37		Request Manager Totals:		0	0	0	0	0	0	0	0	0	0	0	0			
38		Overall Totals:		0	0	0	0	0	0	0	0	0	0	0	0			



**Sharing
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Having actual data makes the theoretical concrete

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Enter data on this sheet	THIS ENTIRE TAB IS FOR YOUR PRIVATE USE AND WILL BE DELETED BEFORE YOU SUBMIT YOUR DATA. *See instructions, page 14. If you have any questions, contact Dennis Massie, OCLC Research, massied@oclc.org. Scroll down for extra rows for each Staff category.													% of ILL expense to be applied to Cons. Borr. Supplied	% of ILL expense to be applied to Cons. Borr. Supplied
			Annual salary	Fringe benefits	%ILL (enter as .XX)	Yearly ILL expense	% of ILL expense to be applied to ILL Copies Borrowed (enter as .XX)	% of ILL expense to be applied to ILL Loans Borrowed (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Copies Borrowed (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Loans Borrowed (enter as .XX)	% of ILL expense to be applied to ILL Supplied (enter as .XX)	% of ILL expense to be applied to ILL Loans Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Supplied (enter as .XX)	
1																
18	SEL L	Full-time staff 1	33,280.00	16,972.80	25%	\$ 12,563.20	0	0	0	0	0.28	0	0	0	0.72	0
19	SEL C	Full-time staff 2	31,512.00	16,071.12	13%	\$ 5,947.89	0	0	0	0	0.55	0	0	0	0.45	0
20	FAES A	Full-time staff 3	47,923.20	24,440.73	15%	\$ 10,854.59	0	0	0	0.41	0.15	0.23	0	0.12	0.09	0
22	Bus Off A	Full-time staff 5	42,611.40	15,766.22	16%	\$ 9,340.42	0.09	0.06	0	0	0.43	0.42	0	0	0	0
23	BPL S	Full-time staff 6	45,281.60	23,093.62	1%	\$ 683.75	0	0	0	0	0	0.04	0	0.96	0	0
24	Mailroom P	Full-time staff 7	26,956.80	13,747.97	46%	\$ 18,724.19	0	0.05	0	0.31	0	0.13	0	0.51	0	0
26	Circ L	Full-time staff 9	34,881.60	17,789.62	40%	\$ 21,068.49	0	0	0	0	0	0	0	1	0	0
27	Circ An	Full-time staff 10	41,412.80	21,120.53	10%	\$ 6,253.33	0	0	0	0	0	0	0	1	0	0
28	Circ Az	Full-time staff 11	35,484.80	18,097.25	70%	\$ 37,507.43	0	0	0	0	0	0	0	1	0	0
READY																

Mock-up of “See My Own Data” Lending Report

Expense category	Expense	ILL Copies Sup	ILL Loans Sup	CB Copies Sup	CB Loans Sup	Totals	% of whole
Req mover	2 Movers	6,781	5,835	0	0	\$12,616	3.25%
Consortial Borr	2 CB systems	0	0	0	0	\$0	0.00%
Req manager	1 Manager	4,485	3,807	0	0	\$8,292	2.14%
Totals	Systems	11,266	9,642	0	0	\$20,908	5.40%
Staff	Staff	110,881	104,097	0	98,922	\$313,900	80.90%
Shipping	Postal	0	40,189	0	0		
Shipping	Courier	0	0	0	729		
Shipping	Supplies	81	3,561	0	3,866		
Totals	Shipping	81	43,750	0	4,595	\$48,426	12.50%
Equipment	FB Scanners	3,013	0	0	0		
Equipment	PC's		0	0	263		
Totals	Equipment	3,013	0	0	263	\$3,276	0.80%
	Total \$	\$126,254	\$157,842	0	\$103,780	\$387,876	
	Total Req's	17,769	7,833	0	97,236	122,838	
	Unit Costs	\$7.13	\$20.15	0	\$1.07	\$3.16	
		ILL Copies Sup	ILL Loans Sup	CB Copies Sup	CB Loans Sup		
		\$84,762.00	\$72,205.00	Minus Reimb		\$156,967	
	Adj total \$	\$41,492.00	\$85,637.00			\$127,129	
	Adj unit costs	\$2.34	\$10.93	0	\$1.07	\$1.03	

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Beta Testers to the Rescue: Better Report Layout

FY2015 Resource Sharing Costs for University X

I. Average Costs per Request Filled

				Breakdown of Average Cost ²											
Service	# of Requests Filled	Total Cost of Service	Average Cost Per Request Filled	Staffing		Equipment		Shipping/Supplies		Systems		Supplier / Copyright fees		Reimbursements from Requesting Library	
				Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent		
Borrowing copies	14,079	\$139,788	\$9.93	\$4.04	40%	\$0.05	1%	\$0.00	0%	\$0.57	6%	\$5.27	53%		
Borrowing loans	6,607	\$86,605	\$13.11	\$5.70	43%	\$0.04	1%	\$3.01	23%	\$0.64	5%	\$3.72	28%		
Consortial borrowing loans	51,929	\$29,563	\$0.57	\$0.56	98%	\$0.00	0%	\$0.01	2%	\$0.00	0%				
Lending copies ¹	17,769	\$41,474	\$2.33	\$6.24	88%	\$0.23	4%	\$0.00	0%	\$0.63	9%				-\$4.77
Lending loans ¹	15,084	\$89,692	\$5.95	\$7.19	67%	\$0.00	0%	\$2.90	27%	\$0.64	6%				-\$4.79
Consortial lending loans	71,292	\$99,374	\$1.39	\$1.33	96%	\$0.00	0%	\$0.06	4%	\$0.00	0%				
Document delivery	6,588	\$63,408	\$9.62	\$9.00	94%	\$0.37	4%	\$0.00	0%	\$0.25	2%				
TOTAL for all services	183,348	\$549,904													

Notes:

¹ Cost of Service for Lending copies and loans has been adjusted to account for reimbursements from requesting libraries.

² Individual costs are rounded to the nearest \$.01; Total Costs of Service include accumulated fractions of \$.01.

Beta Testers to the Rescue: Better Report Layout

FY2015 Resource Sharing Costs for University X

II. Total Costs for Each Service

Breakdown of Total Costs																						
Service	Cost of Service	Staffing				Equipment			Shipping/Supplies				Systems						Fee Payments			Reimbursements
		Supervisor	Full-time	Student	Total	Scanners	PCs	Total	Postal	Courier	Supplies	Total	Mover 1	Mover2	Cons Borr 1	Cons Borr 2	Mgr 1	Total	Supplier	Copyright	Total	
Borrowing copies	\$139,788	\$12,147	\$44,779	\$0	\$56,926	\$551	\$163	\$714	\$0	\$0	\$0	\$0	\$0	\$4,418	\$0	\$0	\$3,554	\$7,972	\$61,000	\$13,176	\$74,176	
Borrowing loans	\$86,605	\$8,773	\$27,974	\$910	\$37,657	\$0	\$274	\$274	\$17,224	\$0	\$2,645	\$19,869	\$0	\$2,542	\$0	\$0	\$16,686	\$19,228	\$24,595		\$24,595	
Consortial borrowing loans	\$29,563	\$5,016	\$11,957	\$12,137	\$29,110	\$0	\$6	\$6	\$0	\$447	\$0	\$447	\$0	\$0	\$0	\$0	\$0	\$0				
Lending copies ¹	\$41,474	\$20,247	\$77,168	\$13,467	\$110,882	\$3,013	\$996	\$4,009	\$0	\$0	\$81	\$81	\$0	\$6,781	\$0	\$0	\$4,485	\$11,266				-\$84,762
Lending loans ¹	\$89,692	\$19,571	\$79,037	\$9,897	\$108,505	\$0	\$0	\$0	\$40,189	\$0	\$3,561	\$43,750	\$0	\$5,835	\$0	\$0	\$3,807	\$9,642				-\$72,205
Consortial lending loans	\$99,374	\$8,184	\$77,956	\$8,376	\$94,516	\$0	\$263	\$263	\$0	\$729	\$3,866	\$4,595	\$0	\$0	\$0	\$0	\$0	\$0				
Document delivery	\$63,408	\$6,748	\$45,961	\$6,566	\$59,275	\$1,873	\$577	\$2,450	\$0	\$0	\$20	\$20	\$0	\$0	\$0	\$0	\$1,663	\$1,663				
TOTAL	\$549,904	\$80,686	\$364,832	\$51,353	\$496,871	\$5,437	\$2,279	\$7,716	\$57,413	\$1,176	\$10,173	\$68,762	\$0	\$19,576	\$0	\$0	\$30,195	\$49,771	\$85,595	\$13,176	\$98,771	-\$156,967
Notes:																						

¹ Cost of Service for Lending copies and loans has been adjusted to account for reimbursements from requesting libraries.

Beta Testers to the Rescue: Better Report Layout

FY2015 Resource Sharing Costs for University X

III. Percent of Cost for Each Service Type

Service	Cost of Service	All Staffing		All Equipment		All Shipping/Supplies		All Systems		All Payments		
		Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent	Amount	Percent	
All Borrowing	\$270,974	\$123,693	46%	\$994	1%	\$20,316	7%	\$27,200	10%	\$98,771	36%	100%
All Lending ¹	\$387,505	\$313,903	81%	\$4,272	1%	\$48,426	12%	\$20,908	5%			100%
Document delivery	\$63,408	\$59,275	93%	\$2,450	4%	\$20	0%	\$1,663	3%			100%
Notes:												

¹ Cost of Service for Lending copies and loans does not include reimbursements in order to calculate percentages.

Mock-up of “Comparison with Peers” Lending Report

Criteria you've chosen for comparison:	Academic (higher education) (Primary Library Type)			
	ARL (Secondary Library Type)			
	Midwestern United States (Secondary Library Type)			
	>100,000 filled requests annually (Secondary Library Type)			
	2016 (Fiscal Year)			
Number of matching libraries that contributed data:	Supplier (Your Role)			
	12			
Category of Expense	Your cost	Your % of whole	Median peer cost	Median peer % of whole
Request movers	\$12,616	3.25%	\$15,922	7.33%
Consortial Borrowing systems	\$0	0.00%	\$6,150	2.83%
Request Managers	\$8,292	2.14%	\$9,128	4.20%
Systems	\$20,908	5.40%	\$22,984	14.36%
Staff	\$313,900	80.90%	\$182,000	83.78%
Shipping	\$48,426	12.50%	\$37,250	17.15%
Equipment	\$3,276	0.80%	\$2,672	1.23%
Unit cost -- Supplier	\$3.16		\$4.06	
Unit cost -- Supplier ILL copies	\$7.13		\$8.00	
Unit cost -- Supplier ILL loans	\$20.15		\$19.33	
Reimbursements	\$156,967	40.50%	\$110,932	51.07%
Adjusted unit cost -- Supplier	\$1.03		\$1.75	
Adjusted unit cost -- Supplier ILL copies	\$2.34		\$2.61	
Adjusted unit cost -- Supplier ILL loans	\$10.93		\$11.03	
Unit cost -- Supplier CB copies	\$0		\$0	
Unit cost -- Supplier CB loans	\$1.07		\$1.46	

Mock-up of “Comparison with Peers” Lending Report

Criteria you've chosen for comparison:	Academic (higher education) (Primary Library Type)			
	ARL (Secondary Library Type)			
	Midwestern United States (Secondary Library Type)			
	>100,000 filled requests annually (Secondary Library Type)			
	2016 (Fiscal Year)			
Number of matching libraries that contributed data:	Supplier (Your Role)			
	12			
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Mock-up of “Comparison with Peers” Lending Report

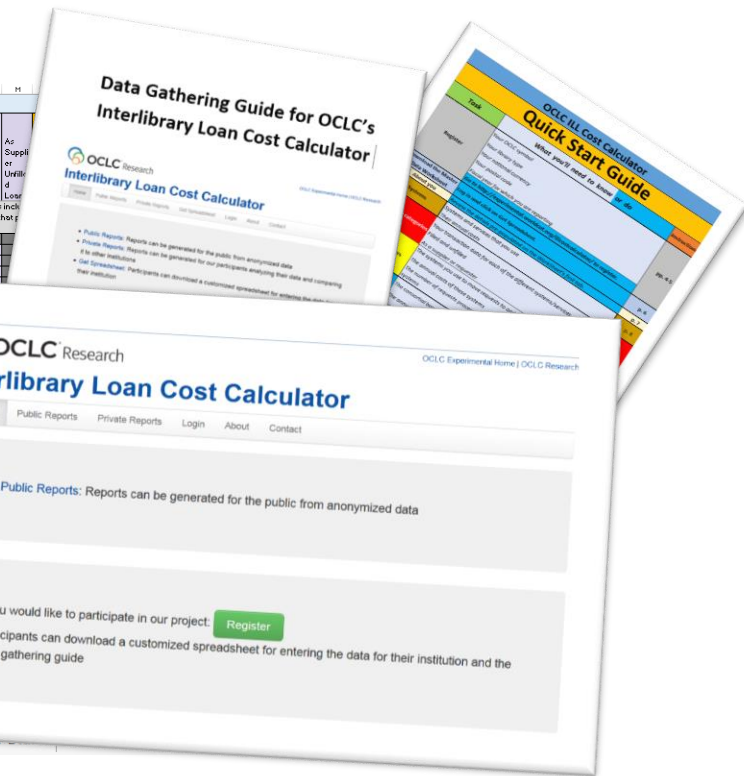
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When

Now in Beta Testing

[illegible]

Birthng an ILL Cost Calculator

- Next 3 months:
 - Beta testers will gather and submit their data
 - OCLC software engineer will build database and reporting functions
 - Beta testers will test reports
- Next 6 months:
 - “Early interest” folks will be invited to submit data
- Eventually
 - We’ll open it up to everyone
 - We’ll work with various groups and organizations to encourage use
- Visit oc.lc/costcalculator for more information.

Future challenges

- Aspects of the current environment we haven't thought of yet
- Suitability for use by non-US libraries
- Attracting participants
- Adapting to new developments in the field
- Sustaining the tool so that we can track trends over time
- ???

Sharing Breakthroughs

2017 OCLC RESOURCE SHARING
CONFERENCE

thank you

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