

Value of Resource Sharing luncheon, 4th edition
Friday, February 9, 2018, 12:30-2:00 pm
Hilton Denver City Center, Homestead Room

Participating:

Peter Bae, Princeton University; Peter Collins, University of Pennsylvania; Tom Delaney, University of Colorado at Boulder; Megan Gaffney, University of Delaware; Krista Higham, Millersville University; Zack Lane, Columbia University; Micquel Little, The Claremont Colleges; Lars Leon, University of Kansas; Kurt Munson, Northwestern University; Heidi Nance, Ivy Plus; Ken Peterson, Harvard University; Matthew Sheehy, Brandeis University; Alison Wohlers, California Digital Library; Joseph Yue, UCLA; Rachel Frick and Dennis Massie, OCLC Research.



I. Summary

The two biggest themes of this session turned out to be:

- We need to understand our patrons -- what they value, specifically, about the services we provide; what we're not doing that they wish we were doing; and what the consequences are when they can't get the research materials they need. There is more than one viable approach to eliciting this information from patrons; we should try as many as we can and report back to the group. We also need to tell patrons' stories in a

compelling way -- which will demonstrate the value of resource sharing probably better than anything else.

- We need to understand how to convey the value of resource sharing not only to our library directors but also to our provosts. We need to understand what interests, concerns, and motivates our provosts, what they value about the library's contribution to fulfilling the mission of the parent institution, and, ultimately, how to speak about resource sharing in a way that is compelling to them.

A. Top tidbits under the “understanding patrons” theme:

Kurt: Patrons love the library for 2 things; 1 is ILL. We treat all ILL requests as equal. To patrons they not equal. Give patrons a button for scale of importance of each article. For survey (see Appendix below) – grad students, 3 largest disciplines. Get information about what was borrowed out of ILLiad – follow up with patron, ask them the questions. Wouldn't have to go to IRD. No personal data. Submit the form through [Qualtrics](#). Lots of assumptions we make about patrons and their requests are not accurate.

[Lars and Micquel: We did a values piece 3-4 years ago.](#) Asked only about value, not these Q's Kurt is asking. Lars is reprising it for Kansas. Patrons are asked: “Describe the value this brings to you.” Quotes from users are better than what marketing people create. Can be used effectively to tell a story.

Kurt: There are always going to be flaws to any patron study. When we start looking at citations – that is inherently measuring success. That does not include the things that were gotten and excluded. Concentrate on faculty. We don't think about support for teaching. Support for the published record. Let's capture many ways in which we support. What are they using things for that we didn't know about? More nuanced picture.

Rachel: Libraries are having to demonstrate the benefit they deliver, and the impact they have on student retention. We are hearing more and more that teaching and learning matters – you'd be ahead of the curve with your ILL patron surveys if you did something with teaching and learning.

Heidi: [Ithaka S-R's “Day in the Life of the Researcher.”](#) Do that with 5 at each of our institutions.

Krista: We could develop a common set of questions, core questions for someone wanting to do an ILL patron study. Users of the question set could mix and match. Would be fewer questions necessary for my institutions, maybe a bigger set for larger institutions.

Peter C.: Just finished read an article in the January 29 issue of the New Yorker called [“customer satisfaction at the push of the button”](#). I cringe sometimes when I hear “survey.” Is

there another way to raise the number of responses besides doing a survey? This model just used a happy or sad face button. Would people click on it or not? Examples from the article talked about being able to track customer service by seeing positive/negative responses immediately. You can then map that to individual staff performance to improve overall service. Sounds great for a cafe. Would it work in a library?

Kurt: We're not going to hurt anybody if we try to do an ILL patron study and fail.

Tom: One of the big issues – people we want to reach aren't going to answer.

Zack: I am a fan of failure. To get responses, set the bar low.

Lars: if you had 4 or 5 different things to try – coordinating point – and then we hear. First Value study went to everybody, then divided them up.

Tom: Quantitative methods and qualitative responses. How to integrate?

Lars: How to do you package stories?

Megan: Make a video.

B. Top tidbits under the “understanding provosts” theme:

Matthew: ILL will have an impact on people doing research. Access-over-ownership is a model libraries have been discussing for years but it has consequences.

Heidi: Look at data for those who have integrated discovery in one place, see how it has impacted.

Matthew: Administrative layer. Libraries usually don't generate revenue for institution. If you are looking for places to cut, you are looking for places that are high cost and low value. We have the value.

Peter C: We demonstrate value – took requests, mapped faculty requests to [Scopus](#). Does use of ILL correlate to publication of faculty? Do not have enough data to share it. These people are using our service and they are using our content. Humanities faculty request a lot of ILL but there weren't citations in aggregators like Web of Science – having trouble getting the right data.

Matthew: Mark Paris (Brandeis collection analysis librarian) did a deep analysis on [Scopus](#). Currently, none of these tools are providing enough data on the humanities.

Heidi: What do provosts value? At your institution? Tailoring your research to measure impact on your type of service. Articles I'm getting are changing the nature of your research.

Peter C: Some places, such as Minnesota, try to correlate student retention with use of the library. Borrow Direct and PALCI's EZ-Borrow say which requested items we own and which we don't. We took the titles requested that we didn't own and calculated the cost if we had needed to purchase those items – This clearly showed million dollars in savings, over a couple of years. Some chaff in the data – some books in there multiple times, but still an interesting snapshot of value in resource sharing.

Megan: We all have stories being told to us by patrons. When we're sending stuff out as lenders, it's bringing value back to our institutions.

Heidi: Goes back to the values of your institution; you have to demonstrate the value of lending.

II. Appendix: Kurt's proposed Northwestern ILL patron study

Qualitative analysis of graduate students ILL requests to determine purpose of use and value of item to the patron

Why: Gain a better understand of how graduate students use the materials they acquired via the ILL service and for what purpose they are using those materials. Assess the patrons' perceived value of those materials in relation to the project they were used for. How important was it for the patron? In other words: how did you use this?, for what?, how important was it?, what value do you place on it? Gather data to assess, see if our assumption align with reality and identify service gaps.

What: Filled interlibrary loan requests for graduate students in 1) History, 2) English, or 3) Theatre. These three subject areas represent the areas of study for our largest user populations.

How: Patrons will complete an identical set of 7 questions (checkboxes, dropdowns, slider value) Qualtrics survey for each item requested. Patrons will be invited via a personalized email send from ILLiad to submit a response for each individual item. The email will include information, metadata, about the specific item about which we are requesting comments on but none of this metadata nor any patron information will be included in the survey.

When: Academic Year 2018

Survey Questions

Area of Study?

English

History

Theatre

For What?

Class paper
Class presentation
Article for publication
Conference Presentation
Master's Thesis
Dissertation
Comprehensive exams
Required reading for class
Recommended reading for class
Other

How will you use this?

Background reading- understand the scope of writing in this area & perform a literature review
Supports your thesis in the project you are working on
Contradicts your thesis in the project you are working on
Canonical work in the area you are researching/studying
Primary source material
Other

How valuable do you think this source is to your project?

5 pt scale

What makes gives this source value in relation to your project?

Original research on a topic similar to mine
Critical to supporting the argument I am making
Contradicts my argument so I need to understand it to argue against it
Canonical text that everyone references
Primary source material
Other

Would you be able to complete your project without this source?

Y/N

Could you substitute something else for this source and still complete your project to your standards?

Y/N

Any additional comments you may have:

Dear ,

Would you help us by filling out a brief 2-5 minute 7 question survey about how plan to use the item referenced here? We want to better understand the many ways graduate students use the material they acquire via interlibrary loan so we can improve the service.

Any feedback you give will be recorded completely anonymously, and the survey itself is located here: [LINK](#).

Thank you for your help! Because we are gather information about different items, you may receive subsequent requests to complete the same survey in the future.

If you have any other comments or questions, please feel free to contact me directly.

Thank you for your time!

Best,

Kurt

III. Extremely Rough Notes -- taken in real time. I guessed, no doubt wrongly at times, as to which Peter (B or C) was responsible for which quote. Corrections welcome!

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Matthew: ILL will have an impact on people doing research. Access-over-ownership is a model libraries have been discussing for years but it has consequences.

Peter C: If there was better availability, would that go to your concern? IDS and RAPID users see a spike in ILL. Perception of ILL being slow and expensive is left over from three-week turnaround of the past.

Kurt: Patrons submit the form and blindly trust us. No communication. Other part – do survey of faculty members. “Why do you do this?”

Krista: At my institution, we have opposite problem. Patrons try ILL, articles come in 2 days. Faculty member asks for pile, have to talk to them. Everyone orders same article for class.

Pete C: Big question all patrons wonder about: How long will it take?

Heidi: Look at data for those who have integrated discovery in one place, see how it has impacted.

Peter B: Complaints from faculty waiting two days for article to come – when it used to take 30 days. We cancelled Elsevier journals, promised patrons 100% access within 15 minutes. We're using commercial service. Stream the article. Deliver the article. Streaming. We will have that special button. Faculty button. RAPID comes within the hour. Provide ejournal. Person has to download file and process. Why not automate? We should develop app, our system will grab and send to other libraries.

Matthew: We need data before we spend money. Anecdotal evidence doesn't justify expenditures.

Kurt: Patrons love library for 2 things. 1 is ILL. We treat all ILL requests as equal. To patrons they not equal. Kurt gave button for scale of importance of each article. For survey – grad students, 3 largest areas. Try to mock something up to create something like this to gather more data than we had in the past. Focus groups – small population, wouldn't have to go to IRD. No personal data. Submit the form through [Qualtrics](#). Lots of assumptions we make are not accurate.

Peter C: Do you think patrons would understand ILL in the same way that you do?

Kurt: Patrons have to click a Yes button – they want something we can't provide locally.

[Lars and Micquel: We did a values piece 3-4 years ago.](#) Asked only about value, not these Q's Kurt is asking. Lars is reprising it for Kansas. Patrons are asked: "Describe the value this brings to you." One Kansas patron is homeschooling her children, values the ability she has to stay at home and have materials sent to her. Quotes from users are better than what marketing people create. Story.

Peter C: People check for ILL when they need something.

Ken: What problem are we trying to solve? Align new researchers? Our technology isn't matching our expectations? Scholar needs in three months. They are putting long-term needs into queue.

Matthew: Administrative layer. Libraries usually don't generate revenue for institution. If you are looking for places to cut, you are looking for places that are high cost and low value. We have the value.

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Krista: Millersville is not a research institution. A few faculty are finishing dissertations.

Heidi: What do provosts value? At your institution? Tailoring your research to measure impact on your type of service. Articles I'm getting are changing the nature of your research.

Kurt: Fear patrons doing a meta analysis. They have to get absolutely everything out there. By the time that gets condensed and boiled down. That is completely lost from publication.

Peter C: Some places, such as Minnesota, try to correlate student retention with use of the library. Borrow Direct and PALCI's EZ-Borrow say which requested items we own and which we don't. We took the titles requested that we didn't own and calculated the cost if we had needed to purchase those items – This clearly showed million dollars in savings, over a couple of years. Some chaff in the data – some books in there multiple times, but still an interesting snapshot of value in resource sharing.

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Megan: We all have stories being told to us by patrons. When we're sending stuff out, it's bringing value back to our institutions.

Tom: It used to be a "good citizen" thing when you are net lending.

Lars: Degree of magnitude. There's net lending and net lending.

Heidi: Goes back to the values of your institution; you have to demonstrate the value of lending.

Matthew: We did an analysis of lending by subject area and it showed we have a weird fiction collection that was originally created from donations when the university started. This collection is in demand. What we have done compared this to subject areas we are borrowing to see if there are natural partnerships.

Ken: Value of consortial relationships – what are they worth?

Micquel: Value of administration – value to our users. How do we show value to those whom we're failing?

Kurt: By the drink – get information about what was borrowed out of ILLiad – follow up with patron, ask them the questions.

Peter C.: Just finished read an article in the January 29 issue of the New Yorker called [“customer satisfaction at the push of the button”](#). I cringe sometimes when I hear “survey.” Is there another way to raise the number of responses besides doing a survey? This model just used a happy or sad face button. Would people click on it or not? Examples from the article talked about being able to track customer service by seeing positive/negative responses immediately. You can then map that to individual staff performance to improve overall service. Sounds great for a cafe. Would it work in a library?

Kurt: We're not going to hurt anybody if we try to do an ILL patron study and fail.

Tom: One of the big issues – people we want to reach aren't going to answer.

Zack: I am a fan of failure. To get responses, set the bar low. Relationships – faster is better by default, but how can we leverage our systems? 80-20 rule. What of the 20? Need to improve people-to-people. Like Prime with less haggling.

Lars: if you had 4 or 5 different things to try – coordinating point – and then we hear. First Value study went to everybody, then divided them up.

Tom: Quantitative methods and qualitative responses. How to integrate?

Lars: How to do you package stories?

Ken: How does one know if ILL exists? Some of kids coming into college don't have libraries back home. We used to force them to come in.

Megan: Make a video.

Krista: How do you pick who will be in the video?

Megan: We asked who are heaviest users, different types, who good on camera.

Ken: If we're smart enough they don't need to know about ILL.

Micquel: It's valuable for users to know materials sourced from outside the library are different.

Peter C: Why can't we communicate expectations at time of order? SFX knows what I have through various means. Can we put a time on it when ordered? If not up front, when the request hits the system and a fulfilment stream is selected, the system should give the user a status, just like ecommerce keeps you updated on order status.

Heidi: Smiley faces there.

Alison: Shared print registry in WorldCat would help us tell story to patrons. Dual nature of preservation and circulation of shared print agreements. Document delivery is getting things immediately – digitize or maintain a digital copy of and have it.

Kurt: We're moving away from which library owns it. We're moving to thinking of logistics, to thinking of where we can get it from.

Rachel: Best place to get it from is always a library.