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## Analyze This: Usage and Your Collection

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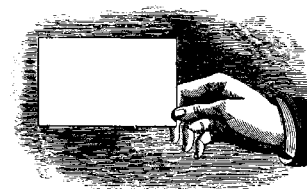
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# Analyze This: Usage and Your Collection — Collection Management and Shared Access in a Contemporary Consortia Environment



by **Sarah Hickman Auger** (Director, Library Platform & Product Strategy, Innovative) <shickman@iii.com>

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**S**hared print management, deselection, collaborative collection development — it's all about balancing the tension between space, budget, and service to users. With real estate at a premium on academic campuses, many libraries are clearing shelf space to make room for areas such as technology labs and collaborative workspaces, making the already challenging chores of weeding and space allocation for incoming acquisitions more difficult. Whether deselection is handled as a large-scale project or an ongoing operational process, local institutions depend on both local and shared catalog and circulation data to evaluate the implications of deselecting particular materials before final decisions are made. In recent years, more formal agreements between groups of libraries have aimed to prevent the inadvertent disposal of unique materials and to ensure there is always a "last copy" within the group to guarantee ongoing access to the materials. However, it's all for naught without effective programs to connect users to those increasingly scarce materials; resource sharing is the key to sustainable collection management.

The same sentiment is echoed across several library consortia with collaborative collection management programs: the keys to success depend on collection analysis across multiple libraries, a focus on preservation, and ready-to-go resource sharing arrangements that support transfer of items between libraries quickly and easily. And that's why we see so many academic libraries doubling down on resource sharing. Access to detailed data regarding requesting, borrowing, and lending patterns across systems means that libraries can be assured they are providing optimal service to their users, as well as tracking that activity to drive local or collaborative collection decisions. This article will share collection-related insights from the experiences of several consortial borrowing (aka resource sharing) systems, as well as describe some of the opportunities for future enhancements to such systems.

An alternative to ILL, **Innovative's** INN-Reach is one system that offers direct consortial borrowing by extending a local circulation model and applying it across a consortia's union catalog. Local systems contribute bibliographic and holdings data to a union catalog, which is exposed in a central discovery interface searched directly by public users (often as a secondary search from the local discovery interface). Highly configurable matching and overlay algorithms ensure a clean union catalog, making it easy for users to find the right materials. Users request materials directly using the same credentials they use within their local libraries; the request triggers standard paging

and transit workflows to fill the request based on real-time circulation status and automated selection of the best available copy (when more than one copy is held across the consortia). Automatic real-time updates (e.g., additions to collection, modifications of circulation status) keep the union catalog in sync with local systems. Because the process is completely integrated into local circulation, no special training is required for staff.

All this integration guarantees the requests will be satisfied quickly with very high "first to fill" rates; that is, over 90% of requests are filled by the first identified source to get materials into users hands within an average of 2-3 days. That's as fast as a patron-driven acquisitions program for physical materials and with no need for the borrowing library to allocate local space for the items. INN-Reach is almost as fast as Amazon Prime, and it's free to the library users. With 50% unique content in the union catalog (representing the 50% of unique collections across local institutions), we're talking valuable, sought-after research materials — many of which might not be appropriate for permanent local acquisition — from discovery to delivery in just a few days.

Even when overhead is factored in (e.g., expenses related to the courier service required to support the rapid transit of materials), the system delivers clear value over ILL. **Gwen Evans** from Ohio Link did a review of cost avoidance among their 91 members over a ten-year period to assign some dollar values to their model.

"I wanted individual members to see how much they borrowed over time versus how much those materials would have cost to buy themselves to understand the value of their participation — not just to the greater good, but to their own bottom line," says **Evans**.

With an average of almost 617,000 borrows each year across the system, she estimates more than \$44.8 million in cost avoidance annually and more than \$433 million over the life of the system. Based on participation and library type, those numbers translate into an average savings during the past decade of more than \$2 million for each two-year institution, almost \$3 million for each private institution, and a whopping almost \$20 million for each public four-year university that participates in the statewide system. Resource sharing systems provide a highly cost-effective way to extend the collection for users — without risk of selecting the wrong titles — where everything shared is specifically requested by an end-user.

The MOBIUS statewide consortial system in Missouri has enjoyed similar success. MOBIUS libraries borrow twice as often and lend nearly three times as often through the MOBIUS union

catalog as they do through their local catalog. With books arriving in two to three days, the consortial system is a core component of how Missouri libraries serve their users. And at an estimated cost of \$2 to \$3 per transaction (compared with \$25 to \$30 per transaction with traditional ILL), systems like INN-Reach are the only scalable way that participating libraries can afford to make so many materials available to their communities.

"Everyone wins in this scenario," says **Donna Bacon**, Executive Director of MOBIUS. "Library users have access to materials that they would never have known about and are empowered to find their own information online and order it themselves. Our libraries can focus their precious resources on collection development and expansion of service, rather than being weighed down by a big bill for ILL."

Earlier this year, **Bacon** joined forces with **George Machovec**, Executive Director of the Prospector system in Colorado, to take things to the next level, growing their members' savings — and the breadth of their cooperative collections — by collaborating across state lines through the use of Peer-to-Peer resource sharing. MOBIUS and Prospector signed an agreement to provide access to their combined union catalogs for every user of each of their member libraries. This inter-consortial borrowing program is the equivalent of adding tens of new members to each system overnight, without the overhead of individual implementations. MOBIUS already enjoyed success across stateliness when Tulsa City-County Library (in Oklahoma) was added to their consortial system, so they knew they could manage the logistics. With 75 libraries of every type represented in the combined Peer-to-Peer collection, MOBIUS and Prospector libraries now have access to more than 27 million items and over ten million unique titles.

"We are excited that the MOBIUS / Prospector partnership will provide patrons with greater access to materials in a multi-state region," **Machovec** says. "This system builds on the commitment of libraries to provide the very best materials to their patrons coupled with fast discovery and delivery."

When asked about the implementation, **Bacon** is careful to note that bringing together two well-established and highly effective independent consortia is not without its challenges. "It's called 'PEER to PEER' for a reason."

In other words, there were compromises to be made to effectively integrate the different pre-existing systems. **Bacon** points to the fact that pulling together well-established consortia with different systems, different models for ac-

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completing tasks, different courier models, and different methods for material handling can be loads of fun but challenging. **Bacon** keeps a list of lessons learned in the process, which include:

- Keep it Simple (but not too simple)
- Better understand staff workflow at different sized libraries
- Expect to compromise and prepare your libraries for the inevitable
- Communicate frequently during your implementation phase
- Don't rush — remember those staff who need extra time to adapt
- Put a personal "face" to the partnership for your members
- And remember...it's all about the courier & workflow!

Both **Bacon** and **Machovec** couldn't be happier with the results. **Bacon** explains, "In the first seven weeks, we circulated almost 2,000 items (with little publicity)!"

It's clear that a resource sharing solution allows patrons to borrow and access research materials in an efficient and cost-effective way, but there is still some local collection development to be done. By tracking requesting, fulfillment, and circulation transactions, library staff has the opportunity to see patterns, which translate into actionable data for local collection development, too.

In talking with several libraries from the California-based LINK+, there was a sense that a real need exists for local libraries to leverage data about the composition and use of the collective collection for making collection management decisions. **Bob Kieft**, Director of **Occidental College Library** (a member of the consortium), explains, "I believe that groups of libraries should be building their collections centrally not locally...new reports help us in a number of ways to think collectively about our inventory and how best to manage that together." He explains it's valuable for retrospective analysis in terms of making deselection decisions, but also for selection decisions — especially in libraries that are still managing more of their acquisitions based on bibliographer review rather than through PDA/DDA programs. **Kieft** continues, "Some version of collective inventory management is the future of library print collections — and might be for electronic too."

That's where reporting plays a key role: libraries can now see, down to the individual item level, every item that's requested in the resource sharing system, including which libraries have borrowed what and from whom. For academic libraries, it's often not as much about the sheer number of materials but the quality of materials. As print usage declines, the materials that users need to continue to access in print are expensive and scarce, so access to a distributed collection across consortia becomes increasingly valuable. These reports show at the subject level or call number range — even at the individual title level — exactly what it is that researchers needed to borrow.

This data enables libraries to see the value of collections that they and their peers have

chosen to specialize in and to demonstrate for stakeholders how those unique materials are serving a broader audience. For example, the **MOBIUS/Prospector Peer-to-Peer** arrangement opens the door for users from **Missouri University** libraries to access the **Colorado Health Sciences Library** collections as easily as their own local collections. Additionally, the reports expose opportunities to streamline access to less unique titles (e.g., purchasing an electronic copy of something that was requested multiple times from a cooperating institution). Integration with user type categories means libraries can leverage information regarding the types of users making repeated requests (i.e., students or faculty) to support collection decisions.

Finally, the structure of the union database enables individual libraries to record institutional selection and deselection decisions locally and expose them via systems like **INN-Reach** for all participating members of the consortia to see. This visibility supports workflows for consortial review prior to permanent withdrawal and offers a common system for libraries to identify and confirm availability of last copies across the consortia. This type of infrastructure and reporting mechanisms are needed to support ongoing collaborative deselection and retention decision-making. Building it into the resource sharing system ensures efficient processes for users to access those last shared copies and contributes to the likelihood of success across initiatives.

Tools like the shared system and access to shared data are incredibly powerful for libraries to mine data for the purpose of driving appropriate actions. What's even better is what systems like **INN-Reach** can support going forward. **Tim Auger**, Director of Resource Sharing at **Innovative**, explains, "In the future, both transaction and selection/deselection data will be automatically analyzed for real-time decision-making, and that's where it gets really exciting." 🐟

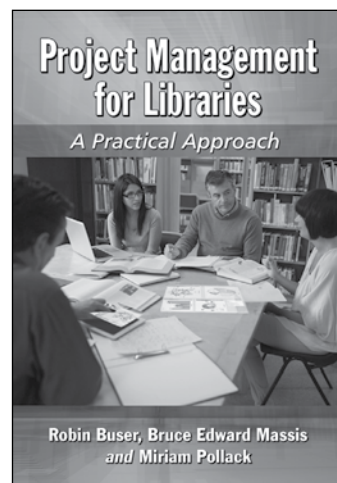
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make improvements. Early MOOCs may have failed, but something, some other platform, is going to sweep in one day and replace the whole enterprise if we do not. I'm no scryer, but I think it's safe to say that we really cannot go on like this much longer, at least not without addressing more seriously some of these important issues.

But we are going to have to do it much faster than we usually do. We academics are very good at talking, not so much when it comes to doing. We like to talk problems to death, but this one isn't going to die. Yes, there is much in academe to commend itself, but that good is fast being overtaken by some of the bad I've mentioned here. I have no magic wand to wave to make these problems disappear. We're just going to have to roll up our sleeves and address these serious problems.

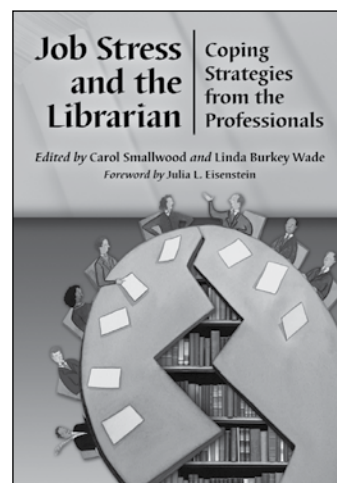
I know if we don't, others will — they are already — and they will be sure not to include us, whom they consider the heart of the problem. 🐟

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