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COKAMO: A Model for Fast, Inexpensive Interstate Delivery

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Abstract

Shipping materials via a library courier service is much cheaper than shipping via the U.S. Postal Service. Most library delivery services are regional or state-based. This article illustrates how two separate services combined to develop the multi-state courier system COKAMO. COKAMO is moving tens of thousands of items between three states at a fraction of U.S. Postal Service rates. Within one year of implementing the system, over 57,000 items have been shipped, creating savings of over \$215,000 for participating libraries. Significant changes in the behavior of interlibrary loan staff throughout the region are evidenced in statistics which show an increase in borrowing between participating states and a decline in interlibrary loan to adjacent states not in COKAMO.

Part I: Background and Analysis of COKAMO

Introduction

Interlibrary borrowing and lending is a big business in the United States. Several years ago, OCLC crossed the threshold of ten million interlibrary loan (ILL) transactions per year, and that number does not include the statistics from hundreds of other active resource-sharing cooperatives. Each item shipped via the United States Postal Service (USPS) averages a cost of \$3.50 to \$4.00 using Media Mail rates, including all materials and labor costs. Libraries using faster commercial services such as FedEx or UPS can pay \$6.00 to \$15.00 per shipment.

In response to these high transaction costs, many states and consortia have developed library courier systems to reduce the cost of local or statewide shipping. Local couriers have done an admirable job of reducing the costs of transactions to a fraction of USPS rates. In larger systems moving millions of items per year, the cost per transaction can be half the price of a First-Class stamp.

However, since no local ILL or courier system can provide every item needed by patrons, libraries are still spending tens of thousands of dollars mailing ILL items across state borders. By extending regional courier services across state lines, substantial savings can be generated.

COKAMO was designed to reduce costs of out-of-state borrowing by connecting regional couriers in Colorado, Kansas, and Missouri. COKAMO supports an OCLC-based reciprocal borrowing agreement and a physical delivery system. COKAMO uses Greyhound Lines, Inc. to ship between the Kansas City Metropolitan Library and Information Network (KCMLIN) and the Colorado Library Consortium (CLiC). This article traces the development of COKAMO, outlines the delivery methodology, and explores the significant change in ILL borrowing and lending patterns taking place in participating libraries--namely, the shift in ILL borrowing behavior to make use of the least expensive delivery option available.



Creating COKAMO

COKAMO is the vision of Susan Burton, Executive Director of the Kansas City Metropolitan Library and Information Network and Valerie Horton, Executive Director of the Colorado Library Consortium. Horton spoke about the concept of linking regional courier systems at the 2006 Texas ILL Conference and again at the 2007 ALA Annual Conference in Washington, DC. In 2008, Burton proposed linking the two delivery systems and spearheaded the creation of COKAMO in May 2009.

KCMLIN is a consortium of 250 Missouri and Kansas libraries. KCMLIN is a complex system composed of three different delivery entities that handle well over a million items per year. KCMLIN serves all of Missouri and a number of libraries on the eastern Kansas border and has the ability to expand. CLiC comprises 410 libraries in Colorado and the University of Wyoming. The Colorado Library Courier has been in business since the mid-1980s and ships over five million items annually. Both organizations have extensive experience in interlibrary loan and delivery and were looking for ways to save money for their members as well as create a seamless method to move materials between the three states.

COKAMO serves academic, public, school, and special libraries. It functions using four different delivery services, two different labeling systems, and two different packaging systems. COKAMO is both a delivery system and a reciprocal borrowing agree-

ment. The physical delivery part of COKAMO works by using Greyhound buses to link the two existing delivery services. Vans from both services take totes of materials to Greyhound three days a week and pick up totes delivered from the other states. The items are returned to the two central sorting hubs in Denver, CO and Kansas City, MO. Typical turnaround time can be two or three days, but occasionally takes a week. Libraries frequently report that USPS Media Mail can take seven to ten business days or more.

COKAMO libraries use OCLC to find items and identify participating libraries for shipping. A reciprocal borrowing agreement is in place and a library's affiliation to COKAMO is indicated in its OCLC profile. Libraries from both systems have been encouraged to create custom holdings (explained below) in OCLC to facilitate borrowing. Each library has also included a unique COKAMO address in its OCLC profile, which shows up on all requests. Downloaded labels are placed on each item to route the item, first to COKAMO from the lending system, and then to the specific library on the requesting side. While non-OCLC libraries do participate, the vast majority of requests are OCLC-based.

Impact

During the first year of the service, a total of 57,990 items were moved on COKAMO. The turnaround time is better than the USPS and the percentage of items lost or damaged is below 1%. Financially, COKAMO has offered a tremendous savings for libraries. Based on an average USPS Media Mail cost of \$4.00 per piece, libraries would have spent \$231,960 to mail the 57,990 pieces moved on COKAMO. KCMLIN and CLiC pay for shipping from their location. For the first year, the total cost was \$16,672, representing a savings for libraries served by COKAMO of \$215,288. A survey of participating libraries found that two large public libraries (Jefferson County Public Library (CO) and Denver Public Library) reported more than \$10,000 in savings in less than one year. Denver Public Library reported

that they had been forced to restrict USPS-based ILL due to costs prior to joining COKAMO, and after joining COKAMO they were again able to fill more requests nationwide.

Process

Cost

Initial cost estimates from delivery companies for long-haul shipments between Missouri and Colorado were exorbitant. However, Burton found a non-traditional carrier: Greyhound Lines, Inc. The bus company already travels between Kansas City, MO and Denver, CO, and the buses had extra luggage space for several book totes. The relationship with Greyhound has been easy, flexible, and very cost-effective. Greyhound has provided quality customer service throughout the process.



Courier book totes and a Greyhound bus (above). Photos used with permission of CLiC and Greyhound Lines, Inc.

Setting up Label Addresses (OCLC)

In order for participants to utilize COKAMO, all libraries were encouraged to modify how they use OCLC's WorldCat resource sharing system. First and foremost, OCLC provides an easy way for all COKAMO par-

ticipants to identify each other. No one wanted cumbersome lists that needed to be checked. Instead, all COKAMO participants are required to modify their "ship to" and "return" addresses in OCLC.

Colorado libraries added their statewide courier code and the word COKAMO to their OCLC addresses. For example, Jefferson County Public Library's OCLC address looks like this:

COKAMO C102/Jefferson Cnty
Public Library/Interlibrary Loan
Dept., 10200 W. 20th Ave., Lake-
wood, CO 80215

Kansas and Missouri libraries also modified their addresses with a general courier code for easy identification. An example from the Kansas City Public Library:

MO99 COKAMO/Interlibrary Loan
Dept./Kansas City Public Library, 14
West 10th Street/Kansas City, MO
64105

Setting Up Custom Holdings (OCLC)

The next step was to encourage all participating libraries to use the OCLC custom holding feature to add the lending libraries' OCLC codes to a COKAMO holding group. For some participating libraries, this was a new experience, as they had not previously used custom holdings. For others, it was simply a matter of creating custom holding groups and putting them into the already established groups in OCLC. The next step was to create the same type of groupings for libraries in Kansas and Missouri. The final step was to redo the order of libraries in the holding queue so that COKAMO libraries came first, followed by everyone else.

Packaging and Labeling

KCMLIN and CLiC have very different methods of packaging materials. CLiC utilizes a double-rubber-band system with a routing slip attached. KCMLIN utilizes nylon bags with an address pocket on the outside.



CLiC Bundle



KCMLIN Bag (Photos used with permission from CLiC and KCMLIN.)

Both organizations have tested their method of packaging and delivery and feel their mode works best for the libraries they serve. Both organizations have invested a substantial amount of time and money into their packaging systems, but in the nature of collaboration have found a compromise that works. COKAMO libraries have adapted to accepting items from partner libraries regardless of how they are packaged.

Reciprocal Borrowing

KCMLIN and CLiC developed a reciprocal borrowing agreement from the start. Not only has a “no fees” initiative been developed for the borrowing and lending libraries, but the resolution of lost or damaged items is negotiated through these two partner networks as well. Although incidents of lost or damaged items have been minor thus far, these negotiations are a critical element to partnerships of this nature. The importance of a collaborative agreement where all parties concerned work for the greater success of the program ensures the trust of the libraries and patrons being served.

Participant Communication

CLiC and KCMLIN each established separate websites that describe COKAMO, answer general questions, and provide process and procedural information. The website information is used in lieu of a formal usage policy or guidelines. Given the unique requirements of each delivery system, participants cannot use the information on the other state’s website.

The CLiC website, and specifically the COKAMO website at <http://www.clicweb.org/COKAMO/index.html>, serves as the main communication tool between CLiC and participating Colorado libraries. CLiC’s COKAMO site consists of two web pages, one for libraries subscribing to OCLC and another for libraries that do not subscribe to OCLC. For non-OCLC libraries, the website describes how COKAMO may be used for physical delivery between Colorado, Missouri, and Kansas. Both websites include an FAQ, a list of participating Missouri and Kansas libraries, labeling instructions, workflow instructions, tracking forms, and shipping and packaging instructions. In addition to these features, the reciprocal borrowing page for OCLC participants contains instructions for creating custom holding groups and adding COKAMO to shipping information. A June 2009 webinar archive answers many user questions as well and can be viewed at <http://connect.cboces.org/p58295787/>. All participating libraries are encouraged to have at least one person subscribe to a listserv specifically for COKAMO business. CLiC uses the listserv to communicate new information, and participants may ask questions there about how COKAMO works.

The KCMLIN website for COKAMO, <http://www.kcmlin.org/CoKaMo/index.htm>, provides information to libraries participating in the service in Missouri and Kansas. An online tutorial walks libraries through the process of using COKAMO step by step. Labeling, tracking, problem reporting, shipping and packaging instructions, and custom holding group information are all found at this website.

KCMLIN and CLiC have shared their training resources from the beginning and have tweaked them to match their libraries' needs. Sharing and collaboration are the key words that have made COKAMO a success.

Teaching Participating Libraries

An important aspect of setting up this service was providing information and staff to deal with questions from participating libraries. Both CLiC and KCMLIN have websites with good instructional information on COKAMO. In addition, there are various consortia staff and participating library staff who can be contacted to answer questions. Webinars are frequently used to update information and resolve problems.

Delivery Problem Resolution

Misrouted material can happen either through mislabeling at the sending library or mis-sorts at the sorting facility. Both types of problems have occurred infrequently during the first year of the service. Representatives from KCMLIN and CLiC communicate when misroutes become problematic and work together to educate library staff on proper labeling. Mis-labeled items are sent to CLiC, where they are re-labeled and sent on to their destinations. In the event that a library makes repeated mistakes, the CLiC Courier Manager will contact the library and provide individualized training. The Colorado sorting facility initially made some missteps, such as placing items in Missouri-bound totes that actually belonged on the Colorado Library Courier, but through training at the sorting facility these mistakes have greatly decreased.

Participant Evaluations

A survey of participating libraries found 86% of respondents rated COKAMO's delivery times as "good" or "better," and 85% of respondents also said they were either "satisfied" or "very satisfied" with COKAMO overall. Here are a few user comments from the survey:

- "I think it's great. I love that Greyhound is used."

- "We have been on board since September and are satisfied with the service. We choose KS & MO libraries first when ordering though WorldCat."
- "This service is cheaper and easier than using the US mail. The extended courier service seems to be reliable. We don't have a larger volume, but this is a service that may keep growing with a country wide system for future interlibrary loan ... wouldn't that be grand!"

A regional delivery system also appears to be encouraging a broader willingness to share materials. Participating public libraries are now more willing to ask patrons if they would like to borrow an item through interlibrary loan rather than simply stating that the book is not available. Items that were once unattainable within a state are now easily attainable and deliverable through COKAMO. Some examples on a recent survey include:

- "One of our patrons needed a book on pigeon raising with a fairly short time-frame. We were able to fulfill this request using COKAMO."
- "Patrons with visual impairment can borrow large print books that we do not have on our shelf."
- "Patron needed health resources for recently diagnosed MS. Found much that we did not have through COKAMO and delivered through the courier."
- "We have been able to order musical instrument how to play and make books for patrons."

Participating libraries have quickly become dependent upon the service and continue to express a desire for expansion to other states. Both consortia are looking for additional partners with the hope of creating a larger delivery region in the next few years. Both organizations have pledged to continue to develop a regional delivery service together.

Part II: Case Study of COKAMO Implementation at Jefferson Country Public Library (JCPL)

Benefits and Processing Changes at Jefferson County Public Library (JCPL), CO

There are two immediate benefits to COKAMO at JCPL. The first is money and the second is time—two resources that are in shortage at all libraries.

The most quantifiable benefit is cost reduction. As stated earlier, COKAMO started operation in May 2009. In April 2009, JCPL's postal costs to Missouri and Kansas for the 176 items borrowed and lent at our average Media Mail rate of \$2.63 per package came to \$462.88. In May, with COKAMO in place, we lent and borrowed 382 items. If we had mailed all 382 items, our postal costs would have been \$1,004.66. Instead we were using the courier through COKAMO. The average cost of shipping an item through the courier is \$0.24. JCPL's cost for shipping 382 items that May was \$91.68, a very significant savings for Jefferson County Public Library! In the year that we have been on COKAMO, we have borrowed and lent 4,467 items to our partner libraries in Kansas and Missouri. Shipping costs came to \$1,072.08; compare this to the \$11,748.21 the USPS would have collected from JCPL.

Delivery times have also changed. Items going through COKAMO are moving faster than when we used USPS Media Mail. USPS items took anywhere from as little as a few days to as long as a few weeks to reach their destinations. Our budget did not allow us to mail items First Class or to use one of the major commercial shipping services. With COKAMO and its set days of moving materials (Monday, Wednesday, and Friday) between Colorado and Kansas/Missouri, items are arriving at libraries more quickly. This resulted in better customer service not only to our patrons but to each other.

There were two natural workflow results from COKAMO: increased requests and a

change in how we choose potential lending libraries in OCLC's WorldCat resource-sharing system. JCPL once looked at Texas, New Mexico, and Utah libraries as natural lending partners, but we now first look at Kansas and Missouri. It made sense to us to borrow and lend from libraries that have inexpensive delivery costs (remember the cost of \$0.24 per item). Added to that is the fact that the COKAMO delivery only requires minimal packaging: literally two rubber bands and a courier or transit slip indicating where the item is going. This saves us staff time when it comes to packaging and money when it comes to packaging supplies.

Part III: Interlibrary Loan Behavior Changes

As stated in the case study above, libraries are changing their borrowing and lending behavior as a result of COKAMO. The charts below show an increase in ILL traffic with COKAMO states and a decrease for non-COKAMO states. (Kansas numbers are not tabulated as they include only a small number of the state's libraries.)

Table 1: Change in COKAMO Loans

<u>COKAMO LOANS</u>	<u>2008-2009</u>	<u>2009-2010</u>	<u>Percent Change</u>
CO loans to MO and KS	12,246	17,175	40.2%
MO loans to CO and KS	30,180	32,805	8.7%

Table 2: Change in Non-COKAMO Loans

<u>NON-COKAMO LOANS</u>	<u>2008-2009</u>	<u>2009-2010</u>	<u>Percent Change</u>
CO loans to AR, NM, OK, TX	20,797	18,935	-9.0%
MO loans to AR, NM, OK, TX	21,378	19,736	-7.7%

These statistics suggest that COKAMO is encouraging a shift away from more expensive shipping options in non-COKAMO states and towards more traffic between less



expensive COKAMO partners. As new states are added to the regional network, it is possible that regional cooperatives organized around inexpensive delivery networks could replace most national ILL traffic. This regionalization should result in significant savings for participating states or regions.

Conclusion

COKAMO is an innovative and creative model that will continue to grow and can be replicated and expanded. Cost savings should continue to grow as more traffic shifts from USPS to the linked regional couriers. Libraries continue to shift their OCLC requests to libraries participating in COKAMO, and this trend is also likely to continue. There are complexities involved in working with hundreds of libraries across three states. It is possible that as new states are added to the service the complexity will start limiting growth, but this has not yet happened with the original three participating states. COKAMO recently won two awards, one from the Mountain Plains Library Association and the Innovation Award from Rethinking Resource Sharing. Overall, COKAMO is considered a success among participating libraries and has become a critical core function for both consortia involved.