

June 4, 2018

TO: Resource Sharing Committee members

FROM: Jane Plass, RAILS Associate Executive Director

ABOUT: Benefits of Resource Sharing

During the February 26 committee meeting, we discussed the need for data on the benefits of library resource sharing. Unfortunately, available data is scarce and generally limited in scope. Reasons include the following:

- There are many forms of resource sharing, and different libraries participate in different forms to varying extents.
- Many libraries participate in multiple consortia—for example, their regional library system, a shared catalog consortium, and an e-book consortium.
- Comparative data can be difficult to get. For example, a library that has belonged to a shared catalog consortium for a long time typically wouldn't know what a standalone integrated library system would cost, unless the library had recently gone through a procurement process. Staffing differences would also have to be factored in, as the consortial staff would handle technical issues and possibly provide cataloging.
- Many benefits of resource sharing can't be quantified. Examples: increased expertise and a stronger professional network through participation in joint projects; more favorable e-resource licensing terms because the consortium has greater leverage as a whole.

Published information on benefits of resource sharing often focuses on academic consortia, with heavy emphasis on shared e-journal packages and other e-resources. For example, the Ontario Colleges Library Service (OCLS) has begun publishing a visual summary of performance and value indicators. The most recent (FY2016/17) is attached with OCLS' permission and is also available at <https://www.ocls.ca/about-us>. A bibliography with selected journal articles is also attached.

Because of the lack of data on benefits of resource sharing, the International Coalition of Library Consortia (ICOLC) has recently begun a project to develop models for calculating the return on investments for various services. This work is just beginning, with the goal of presenting recommendations at the ICOLC North American spring meeting in April 2019.

The RAILS fiscal year 2018 ends on June 30. We will use FY2018 financial and statistical information to develop performance and value indicators for some core resource sharing services. This work will take some time, but results may be available for the December 10, 2018 meeting of the Resource Sharing Committee.

# Performance & Value Indicators

## Number of Licensed Product Bundles

**232**



a **32%** increase since 2013



Each bundle contains hundreds or thousands of digital resources for student access.



## Customer Service Survey

A customer service survey conducted in winter 2017 identified



**100%**

OCLS's Customers



Very Satisfied



Satisfied



## Access to Collective Resources Facilitated by OCLS

Ratio of system-wide to local college resources in FY 2015/16



Average Small



**18**

SYSTEM-WIDE

**1**

LOCAL



Average Medium



**9**

SYSTEM-WIDE

**1**

LOCAL



Average Large



**4**

SYSTEM-WIDE

**1**

LOCAL

Students in Smaller Colleges Benefit Most

## OCLS Supports System-wide Collaboration



**26**

Committees



**182**

Individual Participants

## Professional Development Activities for College Library Staff



**30**

PD/Training Sessions Held by OCLS

**184**

Individual Participants

## Colleges Benefiting from Opt-In Services



**23**

Colleges Using Opt-in Services



**20**

Accessible Content E-portal



**12**

askON Virtual Reference Service



**6**

CORE Digital Repository Service



**15**

Federated Search



**17**

Remote Authentication



**13**

SIRSI Consortium Integrated Library System

### Pilots in FY 2016/17



**9**

askON Proactive Pilot



**9**

CLEAR Local



**23**

eBook Consortium

# Performance & Value Indicators

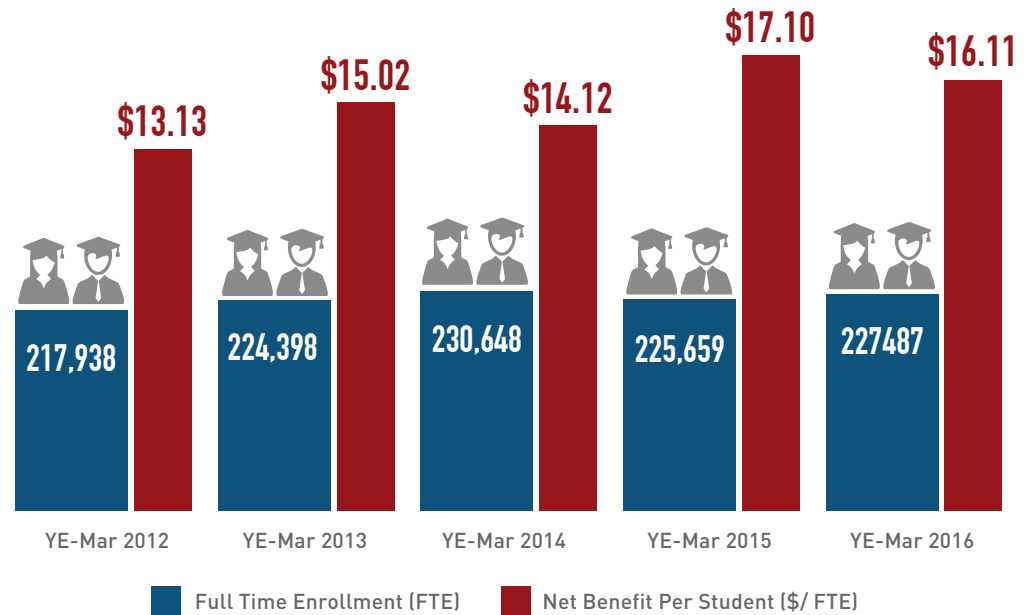
## Cost Benefit Analysis

Since FY 2012/13  
**OCLS HAS SAVED**  
the College Library System

over  
**\$17 MILLION**  
after covering its own costs



## Net Benefit Per Student (\$/FTE)



## TESTIMONIALS

“  
OCLS provides incredible expertise and support to help the collective college libraries achieve much more than we could ever accomplish on our own.”

“  
OCLS's role in delivering library services to our students and faculty is central.”

“  
The services provided by OCLS enable me to redirect my funding for new strategic initiatives and directions. Thank you OCLS for your great support and high level of customer service!”

“  
The cost savings with our collective bargaining power and OCLS's contract expertise are among the best collective initiatives I have seen in the college community.”

# Library Consortia and Return on Investment: A Bibliography

Chadwell, Faye A. 2011. "Assessing the Value of Academic Library Consortia." *Journal of Library Administration* 51:7-8, 645-661. DOI: 10.1080/01930826.2011.601268.

*Abstract:* The value proposition of academic library consortia often focuses on the benefits a member library expects to receive in return for its paid membership in a consortium. This article takes a look at the literature of library and information science as well as the Web sites of 45 academic library consortia to understand how consortia communicate their benefits, especially in terms of financial value. It initiates a discussion about how academic library consortia could adopt assessment measures that strengthen their value proposition and improve the ways they demonstrate their impact and the impact that their members wield within higher education.

Machovec, George. 2013. "Library Consortia: The Big Picture." *Journal of Library Administration* 53:2-3, 199-208. DOI: 10.1080/01930826.2013.853504.

*Excerpt:* Aside from the direct financial value of participating in a group, there are a number of non-monetary benefits in membership with most groups including closer working relationships with libraries in a region, training/education programs, joint ventures, committee participation advancing the cause of libraries, and greater leverage with the publishing/vendor industry as a result of teaming up with others. (pp. 205–206)

Machovec, George. 2015. "Calculating the Return on Investment (ROI) for Library Consortia." *Journal of Library Administration* 55:5, 414-424. DOI: 10.1080/01930826.2015.1047282.

*Abstract:* Library consortia are under increasing scrutiny regarding their value to member libraries. Most consortia offer a suite of services which can be valued either quantitatively or qualitatively to determine a return on investment for money and time put into consortial activities. Various common consortial activities are discussed with thoughts regarding their value to local libraries. Recommendations and suggestions are provided on how to perform a Cost Benefit Analysis (CBA)/Return on Investment (ROI).

Ontario Colleges Library Service. "Performance & Value Indicators." <https://www.ocls.ca/about-us>

Pan, Denise and Fong, Yem S. 2010. "Return on Investment for Collaborative Collection Development: A Cost-Benefit Evaluation of Consortia Purchasing." *Collaborative Librarianship* 2:4, article 3. Available at <https://digitalcommons.du.edu/collaborativelibrarianship/vol2/iss4/3>

*Abstract:* This paper describes the cost-benefits and the return on investment of one consortium comprised of five separately administered libraries in the University of Colorado (CU) System. With a long history of collaboration, the libraries have developed an ideal cooperative arrangement for acquiring electronic content that is accessible across all campuses. The size and flexibility of this institution-based consortium allows it to be responsive and successful in collaborating across four campuses despite different sized budgets and unique local and institutional constraints. To demonstrate the value of jointly leveraging library budgets to university administrators, the authors conducted a consortium level cost-benefit analysis and describe the methodology used to quantify return on the university's investment. This paper

addresses both qualitative and quantitative outcomes and underscores how consortial participation has become an essential way of doing business.

Sandler, Mark. 2014. "How Super-Consortia Saved Our Libraries from the Forces of Evil...and Themselves." *Collaborative Librarianship* 6:1, article 1. Available at <https://digitalcommons.du.edu/collaborativelibrarianship/vol6/iss1/1>

*Excerpt:* In the real world of academic and library consortia, we seem to take for granted the notion that cooperation is empowering. Most library consortia tell us that through the miracle of collaboration they can:

- Save member libraries money by leveraging increased market clout
- Foster innovation by facilitating the sharing of best practices, expertise, and building and reinforcing peer networks
- Amplify the voice of an individual library director by surrounding it with an accompanying choir
- Provide professional development opportunities for library personnel
- Share resources, such as books, services, and expertise, to expand learning and research opportunities for library constituents
- Streamline library operations by consolidating duplicative tasks

Sanville, Tom. 2008. "Do Economic Factors Really Matter in the Assessment and Retention of Electronic Resources Licensed at the Library Consortium Level?" *Collection Management* 33:1-2, 1-16. DOI: 10.1080/01462670802157791.

*Abstract:* Does it really matter if the resources an academic library buys or licenses are in some way deemed economically efficient expenditures? Does it really matter if the resources a library consortium buys or licenses are in some way deemed economically efficient expenditures? Or can economic efficiency be dismissed by the obvious imperative of the immediate, compelling, and continuous need to support the instruction and research activities of the institution? With the electronic medium, libraries have counts of information use. Care must be taken in what is being counted, but counts do exist. This leads to measuring the cost per use of licensed resources. With comparable measurements across subscriptions, we have an economic dimension to evaluate the relative value of our investments. Are these economic measures major factors in our decision-making? Do bad cost per use or large price increases trump other factors? If licensed resources are core to a discipline with no substitutes, does cost per use matter? These issues are explored from the perspective of a consortium licensing resources for a diverse set of member libraries.