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OCLC ILL Cost Calculator: **How can we make it useful for print archiving?**

Dennis Massie

Program Officer, OCLC Research

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, Mike Paxton, 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

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.

Free Web-based tool, coming soon

[Login](#)

Interlibrary Loan Cost Calculator

[About](#) [Public Reports](#) [Private Reports](#) [Contact](#)

Learn your own collection-sharing unit costs and compare them with anonymized peers.
Participants can download the data-gathering guide and a customized spreadsheet for entering the data for their institution.

If you would like to participate in our project: [Register](#)

The OCLC ILL Cost Calculator is an experimental tool built and maintained by OCLC Research. This project is covered by the following OCLC policies:



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Register, self-classify your ILL unit

Enter institutional information:

OCLC Institution Symbol OR Institution Name

Primary Library Type

Secondary Library Types (Check as many as apply; these will serve as the basis for comparing your data with that of anonymized peers.)

- | | | |
|--|---|---|
| <input type="checkbox"/> ARL | <input type="checkbox"/> Corporate/Business | <input type="checkbox"/> Museum |
| <input type="checkbox"/> Archives | <input type="checkbox"/> Hospital | <input type="checkbox"/> National |
| <input type="checkbox"/> Branch | <input type="checkbox"/> Law | <input type="checkbox"/> State/Province/Territory |
| <input type="checkbox"/> Community College | <input type="checkbox"/> Medical | |

List other Secondary Library Types you would like to use to describe your institution.

Currency

Postal Code

Funding source

- ☐ Mostly Public ☐ Mostly Private ☐ Not sure / Prefer not to answer

List up to five consortia to which you belong and within which you will want to compare unit costs. These can be local, regional, national or international consortia, including consortial borrowing groups, RapidILL pods or "GACs" set up for you by OCLC. We will normalize your free-text choices and offer a work-in-progress list of consortia being submitted by users.

Region

- ☐ None of these ☐ Northeastern US ☐ Midwestern US ☐ Southern US ☐ Western US ☐ England ☐ Northern Ireland ☐ Scotland ☐ Wales

List Regions you would like to see for your part of the world.

Delicious data points, sliced just so...

1	OCLC ILL Cost Calculator			
2	Quick Start Guide			
3	Topic/Task	What you'll need to know	or do	X
4	Register	Your OCLC symbol	Your national currency	
5		Your library type	Your postal code	
6		Go to https://illcostcalculator/ to register.		
7	Download the Worksheet and Instructions	Log in.		
8		Click on Get Spreadsheet.		
9		Click on Get Data Gathering Guide.		
10	About you	Review the details pre-populated on the Worksheet's first tab.		
11		Your top 5 consortia to which you belong		
12	Systems	Systems and services that you use	Their annual costs	
13	Transaction Categories	Your transaction data for each of the different systems/services		
14		Filled and unfilled		
15		As Supplier or Requester, plus deliveries to your patrons from your own collections		
16	Request Movers	Systems that you use to move requests to and from other libraries		
17		Annual costs of these systems		
18		Number of requests processed as supplier and requester on each of these systems		
19	Consortial Borrowing	Consortial borrowing systems that you use		
20		Their annual costs		
21		Number of requests processed as supplier and requester on each of these systems		

22	Request Managers	Request management systems that you use.		
23		Their annual costs		
24		Number of requests processed, as supplier and requester, manually or via the ISO ILL protocols, on each of these systems		
25	Staff	Staff member salaries and benefits		
26		% of time each Staff member spends on collection-sharing tasks		
27		% of each Staff member's collection-sharing time spent on each task category		
28	Other	Shipping	Borrower fees	
29		Equipment	Reimbursements	
30		Consortial dues	Uncategorized expenses	
31	Automation	Think about all of your collection sharing processes.		
32		Estimate the degree of automation of each of those processes at your institution.		
33	Saving your work	Save a copy of the complete Master Data Worksheet for yourself.		
34		On the Staff Totals tab, re-type the total costs for each Staff category.		
35		Delete the two Staff worksheet tabs, Enter Staff and Review Staff.		
36		Rename without the two Staff worksheets; include your OCLC symbol in filename.		
37		Email the file to massied@oclc.org .		
38	Next steps	Await word from massied@oclc.org that your data is ready to be queried.		

Mock-up of Comparison-with-Peers 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	

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Some things on our “future iterations” wish list...

- Factoring in the cost of storing on campus vs storing remotely
- Factoring in the cost of delivering from a remote facility vs sending to main library for delivery
- Measuring (or, better yet, predicting) the cost difference of borrowing an item rather than purchasing it
- Measuring (or better yet, predicting) the cost difference of lending an item rather than purchasing and giving it away

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- ***(OK, that last one was a joke. Mostly.)***

Having actual data makes the theoretical concrete

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	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.														
			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 Copies 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. Copies Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Loans Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Loans Supplied (enter as .XX)	% of ILL expense to be applied to Cons. Borr. Loans Supplied (enter as .XX)
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

Question for the PAN Forum:

What data or reporting would make the ILL Cost Calculator useful for planning and assessing shared print activity?

**ALADENVER
MIDWINTER**
Meeting & Exhibits

thank you

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#ALAMW18

Stay connected

