

Recovering ILL Copyright Fees: a strategy for success

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Background

The Health Sciences and Human Services Library (HSHSL) provides Interlibrary Loan (ILL) service to the University of Maryland, Baltimore's (UMB) schools of dentistry, medicine, nursing, pharmacy, social work, and a graduate school. In the past, the HSHSL absorbed copyright fees. Due to flat resources budgets and increasing costs of journals, the HSHSL has canceled journal subscriptions resulting in increased demand for ILL services and higher costs for copyright fees. To sustain the ILL service, the HSHSL implemented a charge-back model in April 2016 in which schools and units pay for articles requiring copyright fees.

Communication - Making the case

Fall 2015 – Began preparing UMB for new policy

HS/HSL Executive Director met with individual deans

- ❖ Data driven presentation was used to start the discussion, highlighting the need to recover copyright costs.
- ❖ Overall annual costs and individual school costs were discussed
- ❖ Deans were asked for their opinion about frequency of billing

Deans supported the billing decision; they asked for additional data about their schools

January/February 2016 – Reports prepared

- ❖ Email sent to deans postponing billing until 3rd quarter of FY16 while reports were prepared in response to their request
- ❖ Each dean received a report including:
 - › Trend analysis (5.5 years) of ILL data: # of requests divided by faculty and student
 - › Top ten requestors from each school
 - › Top ten most requested journals

April 2016 – Billing begins

- ❖ Faculty, staff, and student fees are billed to individual schools
- ❖ Invoices for the schools of medicine and pharmacy are generated by department for internal charge back – invoice includes only requester name and cost, not article information to protect privacy

Communication - Continuing the conversation

Advisory group comprised of research deans from each school established to provide ongoing feedback

Presentation to advisory group included:

- ❖ Overview of ILL – resources used to obtain ILLs, CONTU guidelines, copyright fees
- ❖ Data on the # of copyrighted articles requiring a fee (1% - 14%) vs articles provided at no charge (86% - 99%) by school
- ❖ Alternate billing models
 - › Cap the maximum amount that will be paid for copyright
 - › Charge a fee of \$5-\$8/article for all ILL requests
 - › Provide only “no cost” articles to faculty, staff, and students. For articles requiring a copyright fee, refer individuals to a document delivery provider.
- ❖ Advisory group concluded that the current model for billing is most viable

Deans provided with a 3 year statistical analysis of ILL activity for their school on annual basis

Users' questions are answered via phone or email

Lessons Learned

- ❖ Communication is the key – school deans, research deans, and users
- ❖ Data, data, data... present statistical analysis to make the case
- ❖ Listen to users – adjust the process to meet user needs
- ❖ Work with IT to make the process more efficient

The Bottom Line

\$102,050 has been recovered since billing started in April 2016