
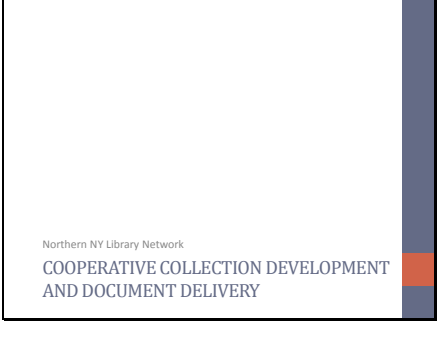
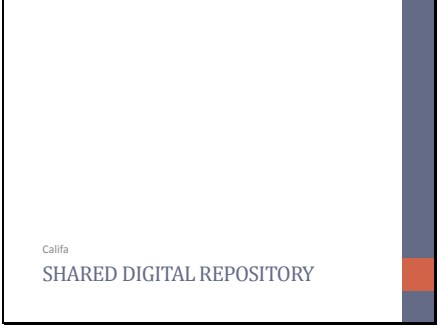
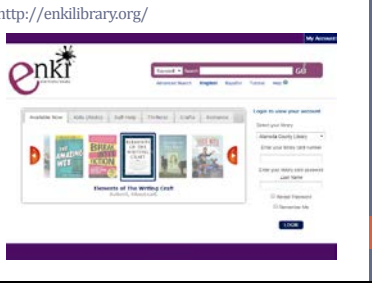


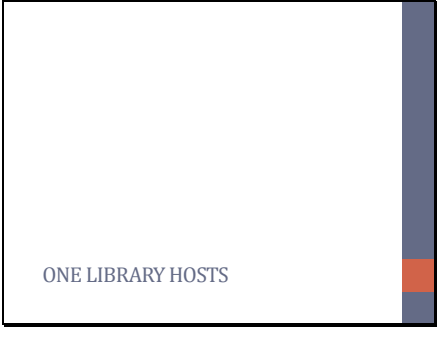
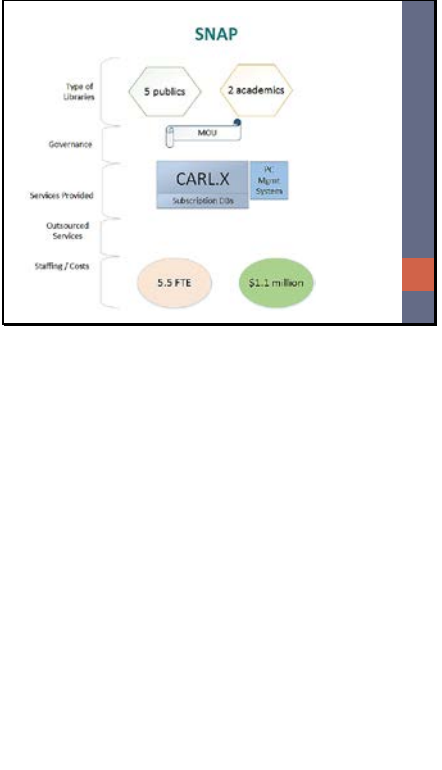

1	<h2>On Forming a New Public Library Consortium in South Dakota</h2> <p>Lori Bowen Ayre Principal Consultant The Galecia Group lori.ayre@galecia.com</p>	<p>On Forming a New Public Library Consortium in South Dakota</p> <p>Black Hills Area Library Conference</p> <p>April 29, 2014</p>
2	<h3>About Me</h3> <ul style="list-style-type: none"> Library technology consultant specializing in materials handling, RFID, resource-sharing, and delivery Have worked with numerous consortia and state agencies around the country including: <ul style="list-style-type: none"> Illinois (delivery study) RAILS (resource-sharing systems) Massachusetts (delivery and resource-sharing) Vermont (shared ILS) California (delivery, share) 	
3	<h3>Why Do Libraries Join Consortia</h3> <ul style="list-style-type: none"> 50% of consortia provide the following services to their members: <ul style="list-style-type: none"> Training Shared electronic content Physical Delivery Group purchasing In South Dakota, the State Library provides many of these services: <ul style="list-style-type: none"> Training Shared electronic content Physical Delivery 	<p>The source of much of this introductory material is from a forthcoming book “Whither Consortia” of which I am a contributing author. Editors are Greg Pronevitz and Valerie Horton.</p> <p>The State Library takes care of many of the services most often provided by consortia including training, shared electronic content, physical delivery....</p>
4	<h3>More Reasons Libraries Join Consortia</h3> <ul style="list-style-type: none"> 24-50% of consortia provide the following services: <ul style="list-style-type: none"> Consulting Mediated ILL (returnables) Coop. collection develop Document delivery (non returnables) Shared digital repository Shared ILS In South Dakota, the State Library provides the following services: <ul style="list-style-type: none"> Consulting Mediated ILL (returnables) 	<p>State Library also provides consulting and mediated ILL.</p> <p>So, what is State Library NOT doing that a new consortia might do?</p>

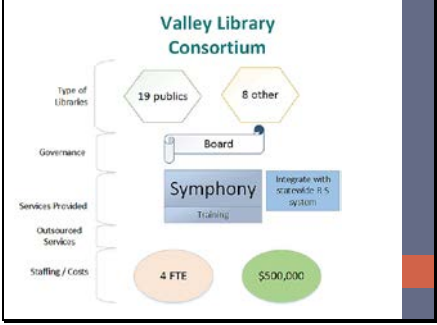

5	<p>Fill in the Blanks?</p> <ul style="list-style-type: none"> • Group purchasing • Cooperative collection development • Document delivery (non-returnables) • Shared digital repository • Shared ILS 	<ol style="list-style-type: none"> 1. Group purchasing 2. Cooperative collection development 3. Document delivery (non-returnables) 4. Shared digital repository 5. Shared ILS <p>Very briefly, some examples of the first four on the list and then we'll focus mostly on the shared ILS option.</p>
6		<p>In Group Purchasing, a good example from Connecticut Library Consortium</p>
7	<p>Connecticut Library Consortium http://ctlibrarians.org</p> <p>Saved members Over \$2.9 million in 6 months including:</p> <ul style="list-style-type: none"> • 29% savings on AWE Early Literacy Stations • 24% savings on Scholastic Flix • Discounts on conference registrations and transport • 15% savings on EBSCO Databases • Discounts on Tumblebooks, Movie Licensing USA, JobNow, Hill-Donnelly Directors 	<p>Saved members Over \$2.9 million in 6 months including:</p> <p>29% savings on AWE Early Literacy Stations 24% savings on Scholastic Flix Discounts on conference registrations and transport 15% savings on EBSCO Databases Discounts on Tumblebooks, Movie Licensing USA, JobNow, Hill-Donnelly Directors</p> <p>Sources/More Info: http://ctlibrarians.org/associations/10663/files/2012-2013%20highlights.pdf http://ctlibrarians.org/associations/10663/files/AnnualReport.pdf</p>
8		<p>Cooperative Collection Development and Document Delivery are more the domain of academic libraries but there is one public library consortium that provides these services: Northern NY Library Network.</p>

9	<p>Northern New York Library Network http://www.nnyln.org/</p> <ul style="list-style-type: none"> • 52-member regional, multi-type consortium • Staff: 6 FTE • Services: <ul style="list-style-type: none"> • ILL and electronic document delivery • Manage Coordinated Collection Development Aid (CCDA) grants for academic members • Evaluate usage of shared digital collections biennially • Training and professional development • Digitization services • Cooperative purchasing (including databases) • Interface with statewide delivery service 	<p>NNYLN is a 52 member multiple consortium with a staff of 6.</p> <p>What they do in the area of cooperative collection development is to manage the CCDA grants program.</p> <p>Cooperative Collection Development AID grants are for academics only</p> <ul style="list-style-type: none"> • CCDA grants program (State Library funded) • Libraries receiving coordinated collection development funds report statistics describing the format(s) of the materials bought and the overall increase in collection size for the subject area designated for collection. • Online usage of shared digital collections is assessed by usage and through a biennial evaluation process. (every two years) <p>Also, NNYLN tracks usage of shared digital collections</p> <p>Digitize local history material for</p> <ul style="list-style-type: none"> • NewYorkHeritage.org • NYSHistoricNewspapers.org <p>Maintain Archival and Historical Document Collections Finding Aid</p> <p>They do have a union catalog but it is mostly run by TLC. It is only updated quarterly and each library has to check it to see if anyone is requesting material from them. Pretty labor intensive process. Also the TLC product they are using (TLC Library.Request and NetPac) is no longer officially supported.</p> <p>Source: http://www.nnyln.org/plan-of-service/</p>
10	 <p>Califa SHARED DIGITAL REPOSITORY</p>	<p>A good example of a digital repository (and some other services) for public libraries is Califa.</p>

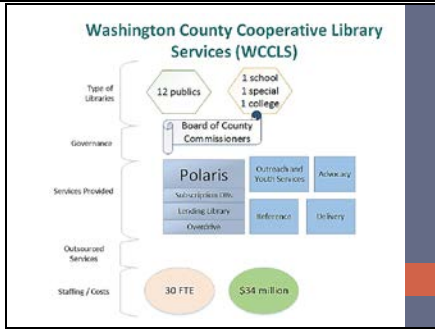
1 1	<p>Califa http://califa.org/</p> <ul style="list-style-type: none"> • 159 member not-for-profit multi-type consortium • Governance: Board of Directors (members elected and appointed) • Staff: 5 FTE with operations handled by PLS • Services: <ul style="list-style-type: none"> • Cooperative purchasing including eBooks • Pioneer new technological projects • Host events • Budget: \$8.4 million from membership, grants, and vendor income 	
1 2	<p>Enki http://enkilibrary.org/</p> 	<p>Enki is Califa's Shared eBook Platform</p> <p>They developed the shared eBook Platform with a member library (and Quipu Group). The platform and ebooks are all member-owned.</p> <p>Contains over 18,000 ebook titles Over 32 libraries participating See http://enkilibrary.org/</p>
1 3	<p>SHARED LIBRARY SYSTEM</p>	<p>QUESTIONS?</p> <p>More and more libraries are moving to shared library systems. ILS or new library services platform, there are numerous reasons to share a library management system.</p>

<p>1 4</p>	<p>Why Sharing a Library Management System Makes Sense</p> <ul style="list-style-type: none"> • Cost Savings • Improved resource-sharing experience for patrons and staff • Higher quality systems staff • Higher quality collection • Better bibliographic control • Much bigger collection for all patrons • Ability to optimize interlibrary delivery and staff interlibrary workflows • Consistency for patrons using more than one library 	<p>From my White Paper – provided as a handout</p> <ul style="list-style-type: none"> • Cost Savings – reducing duplicate hardware/software, making resource-sharing software connecting multiple ILSs unnecessary, sharing cost of expensive software (like discovery layer), eliminate duplicate hosting, support, and staff costs • Improved resource-sharing for patrons and staff – much less complicated than using resource-sharing product to connect multiple ILS, patron experience is unified rather than requiring a second step to get to the union catalog • Higher quality systems staff – share costs of staff with expertise in areas no one library could otherwise afford • Higher quality collection – easier to analyze collection and coordinate, fewer copies of infrequently needed items required, coordinate who keeps the “last copy”, coordinate responsibility for developing deeper collections • Better bibliographic control – more consistency in cataloging and better oversight with dedicated staff • Bigger collection for patrons to choose from • Ability to optimizing interlibrary delivery and staff interlibrary workflows – eliminate routing slips, coordinate holds targeting with delivery routes, no reason not offer 24 hour turnaround time
<p>1 5</p>	<p>Ways Libraries Share an ILS</p> <ol style="list-style-type: none"> 1. One library hosts for the group 2. Non-profit manages system on behalf of members 3. Public-Private Partnership 4. Vendor hosts and supports 5. Members do it all themselves 	<ol style="list-style-type: none"> 1. One library hosts for the group 2. Non-profit manages system on behalf of members 3. Public-Private Partnership 4. Vendor hosts and supports 5. Members do it all themselves

1 6		<p>Numerous examples of this type of consortium in my area: MARINet, Sonoma County (Horizon) with Mendocino and Lake County on the same system.</p> <p>I picked SNAP for this profile.</p>
1 7	 <p>The diagram illustrates the SNAP consortium structure. It shows 5 public libraries and 2 academic libraries. Governance is handled by an MOU. Services provided include CARL.X (Subscription Databases) and PC Major Systems. Outsource Services are also shown. Staffing/Costs are 5.5 FTE and \$1.1 million.</p>	<p>Solano, Napa and Partners (SNAP)</p> <ul style="list-style-type: none"> • Small consortium of five public library systems and 2 academic libraries (17 total outlets) <ul style="list-style-type: none"> • Smallest is single outlet library with 48,224 volumes and annual circ of 11,945 • Solano County, manages the library system (Carl.X) and the public computer management system and provides online databases • MOU between members and Solano County • Staff: 5.5 FTE • Budget: \$1.1 million (half paid by Solano) <p>COST SHARE: Contributions from libraries range from \$36,000 (Dixon) to \$648,000 (Solano County) per year.</p> <p>CHALLENGE: Strong control exerted by large library running the catalog. Need to be careful about defining roles, authority, and decision-making process.</p>
1 8		<p>Most common model is the non-profit entity that runs the ILS with some kind of oversight or management by a Board made up of library representatives.</p>

<p>1 9</p>	 <p>The diagram for Valley Library Consortium is organized into four categories on the left: Type of Libraries, Governance, Services Provided, and Outsourced Services. Under Type of Libraries, there are two hexagons: '19 publics' and '8 other'. Under Governance, there is a 'Board' box. Under Services Provided, there is a 'Symphony' box with 'Training' written below it. Under Outsourced Services, there is a box that says 'Integrate with statewide ILS system'. At the bottom, under Staffing / Costs, there are two circles: an orange one labeled '4 FTE' and a green one labeled '\$500,000'.</p>	<p>Valley Library Consortium http://www.vlc.lib.mi.us/</p> <ul style="list-style-type: none"> • 27-member non-profit, multi-type consortium servicing mostly publics (19) • Governance: Board • Staff: 4 • Services: <ul style="list-style-type: none"> • Shared ILS (Symphony) including cataloging, public access, community resources and circulation, serials management, acquisitions, and remote patron authentication. • Coordinate with statewide union catalog (Mel) • Training • Budget: \$500,000 <p>Link to library catalog: http://hip.vlc.lib.mi.us/ipac20/ipac.jsp?profile=ldl</p>
<p>2 0</p>	 <p>A rectangular box containing the text 'PUBLIC PRIVATE PARTNERSHIP' in all caps.</p>	<p>An unusual consortium in terms of how it is funded comes from Oregon.</p>

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Washington County Cooperative Library Service

WCCLS is a partnership between Washington County, two cities, and two non-profits. Includes 12 public and 3 other libraries.

Governance: Board of County Commissioners

Three main Inter-Governmental agreements: A Governance IGA that defines the advisory/governance structure, the Public Library Services Agreement that defines responsibilities and the funding distribution, and a Network Agreement for use of the shared ILS and telecom network.

Services include:

- Shared ILS (Polaris) Subscription DBs, Cataloging
- Lending Library (ebooks, other resources)
- Outreach, Youth Services, Reference
- Delivery
- Advocacy

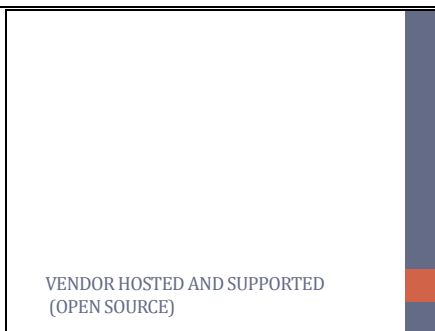
Libraries do not pay WCCLS for services. The funding is separate.

Budget: \$34 million (2/3 from County, 1/3 from city funds, fines and fees, grants and fund-raising)

** Able to focus on providing services that make sense for them to provide in order to support their communities.

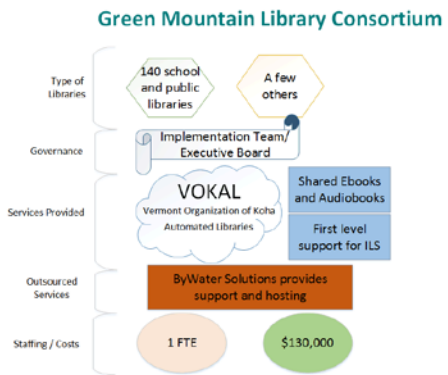
http://www.wccls.org/library_services/wccls

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Last two examples are from the Open Source side of things. Using an Open Source ILS creates new opportunities for consortia. This first example is for Koha.

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Green Mountain Library Consortium

(<http://gmlc.wordpress.com/>)

- Non-profit consortium of 140 multi-type libraries (mostly public and school libraries)
- Governance: Board of Directors (5 members)
- 1 ED and a part-time bookkeeper

Services:

- Shared ILS (VOKAL)
- Shared downloadable ebooks and audiobook collection (ListenUp!)
- Coordinate Mango Languages and Librarian Substitute Pool

History of VOKAL

In 2007, four libraries on stand-alone Follett systems each migrated to stand-alone Koha

2009, four more moved to Koha from their manual systems (including one school)

2010, libraries “unionized” with hosting and support provided by ByWater Solutions.

Not adding new members for the time being.

How does OS make this unique?

1. Updating their software if and when they choose to do so
2. Changing hosting/support contracts without having to change the ILS (they love ByWater but if they didn't, they could change)
3. Becoming expert enough in the software that they could continue without any kind of support if they wanted to.

VOKAL website:

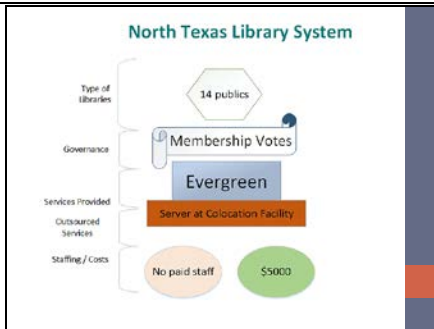
<https://sites.google.com/site/vokalvtpublic/home>

VOKAL catalog:

<http://catalog.kohavt.org/>

<p>2 4</p>	<p>Grassroots Nature of VOKAL</p> <ul style="list-style-type: none"> • No paid staff - Executive Team composed of three volunteers • Members are expected to attend quarterly meetings, participate on committees and mentor new members • Annual cost per Library is \$.03 per item (\$350 minimum) 	<p>Also, you would be hard pressed to find such a high quality ILS for the amount of money this consortium pays.</p> <p>Only cost is for ByWater hosting and support. They charge each member at least \$350 per year or three cents per item in the catalog (whichever is greater).</p> <p>They handle their own training, first level support and implementations using library staff who have developed expertise in Koha.</p>
<p>2 5</p>	<p>MEMBERS MANAGE EVERYTHING NO PAID STAFF - NO VENDOR (OPEN SOURCE)</p>	<p>Another open source example from Texas. This group has no paid staff and relies on library volunteers.</p> <p>Instead of an Executive Board (aka Implementation Team), they make all their decisions by voting.</p>

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North Texas Library System (NTLC)

<http://www.northtexaslibraries.org/>

- 14 independent public libraries
- Governance: Membership vote
- No paid staff. All work is done by members.
- Services: Shared ILS (Evergreen)

Budget: \$5000

As I mentioned with VOKAL, with an open source ILS, you can change service providers without changing your software. That's what this group did. They were paying \$25,000 per year for hosting and support from their previous provider.

Left that service provider, installed the software on their own server at a colocation facility and have reduced costs dramatically while improving performance.

Sample library catalog:

<http://alvarado.northtexaslibraries.org/eg/opac/home>

Egalitarian Nature of NTLC

- Every library that joins has equal influence, regardless of size
- Standing Committees do the work
- Libraries do their own selections, cataloging, and pay their own courier costs
- Per Library Cost
 - Base fee: \$700/year
 - Larger libraries pay additional fees based on population served and collection size

Egalitarian Nature of NTLC - Every library that joins has equal influence, regardless of size

All members are active on Standing Committees which is how the work of managing the system gets done:

- IT Team manages ILS (two library staff with very strong tech backgrounds)
- Cataloging Team coordinates policy
- Treasurer handles finances

Each library does their own cataloging , selection, ordering and pays their own courier costs

Cost per library to participate is \$700/year plus some additional charges for larger libraries based on population served and collection size

History:

- Original system was hosted and supported by Equinox. \$15,000 for hosting and \$20,000 for support. They were told they'd be on a dedicated server but they were actually on a virtual server. Performance issues. Now they own their servers in a colocation facility (\$200/month) and good performance.

- Provide their own support via IT Committee. Currently admin'd by 2. No other libraries had IT staff. May get more people on the IT Committee.

- Each library has their own collection and is responsible for their own patrons and material. Library cards from all member libraries are good at each library.

- Courier services – paid by libraries directly to Courier, coordinated by Treasurer (Board member)

- No paid staff

- Example library costs: Roanoke pays \$1005/year (mid size) – cost per library based on a flat fee (\$700) plus additional fees based on size of population served and collection size

<p>2 8</p>	<p>First Step: Prioritize</p> <p>Important to decide the primary reason you want to form a consortium:</p> <ol style="list-style-type: none"> 1. Reduce costs 2. Improve the quality of the ILS <ul style="list-style-type: none"> • Better integration for ebooks and DBs • Staff with more tech skills • Better cataloging 3. Provide bigger, shared collection for patrons 	<p>Important to decide the primary reason you want to form a consortium:</p> <ul style="list-style-type: none"> • Reduce costs <ul style="list-style-type: none"> ○ just share servers and software and staff ○ e.g. “the cloud” • Improve the quality of the ILS <ul style="list-style-type: none"> ○ Do more with less money ○ Better ILS product ○ Better service provider ○ Better integration for ebooks and DBs ○ Staff with more tech skills ○ Better cataloging ○ Example: Koha Consortium in NorCal, all on one Koha system but completely separate from patron perspective. • Provide bigger, shared collection for patrons <ul style="list-style-type: none"> ○ For this goal, you must share patrons and collections in some way
<p>2 9</p>	<p>“Resource-sharing” doesn’t <i>need</i> to mean sharing collections</p> <ul style="list-style-type: none"> ✓ Servers ✓ Software ✓ Staff ✓ Library material ✓ Patrons ✓ Other services (reference, technical services, outreach, PC management, delivery, advocacy, training, cooperative purchasing) 	<p>So, don’t assume resource-sharing means the full monty. Even a shared ILS doesn’t have to mean “resource-sharing” of library material.</p>

30	<p>Recommendations</p> <ul style="list-style-type: none"> • Vendor-hosted ILS • Active committee structure • Elected Board providing oversight • Small paid staff • Cost sharing formula that ensures that everyone can participate equally 	<p>Based on what I've seen in my cursory review, a group like yours would benefit from the following:</p> <ul style="list-style-type: none"> • Vendor-hosted ILS • Active committee structure • Elected Board providing oversight • Small paid staff • Cost sharing formula that ensures that everyone can participate equally
31	<p>Email me anytime at lori.ayre@galecia.com</p> <p>QUESTIONS!</p>	