

LIBRARY CONSORTIA

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LIBRARY CONSORTIA

Models for Collaboration
and Sustainability

Valerie Horton and Greg Pronevitz



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Acknowledgments

We owe much gratitude to the colleagues who assisted us and contributed to this work, and acknowledge them here in the order in which their contributions appear in this book. A brief biographical sketch for each author is found after the conclusion.

We began research for this book by surveying our consortial colleagues. We thank the 77 who did respond. We focused on the 66 US respondents. We also had 11 international consortial responses. Jeanette Smithee, Southeast Florida Information Network (SEFLIN), was kind enough to work with us to expand on her responses to create a case study of SEFLIN's experiences after the 2008 recession, which can be found in chapter 2.

Discovery to delivery is such an integral part of consortial services in most organizations that we included chapters devoted to both discovery and delivery. Tracey Leger-Hornby, formerly of Worcester Polytechnic Institute, and Lori Ayre, of the Galecia Group, brought the experience and talent to make chapters 5 and 6 possible.

As we examined the consortial landscape and found sustainability to be a key issue, we felt that those directly involved in this important issue would be best equipped to write about the service projects that contributed to sustainability and member library success. We called on colleagues to prepare case studies of innovative projects to share with our readers and we are grateful for their efforts. These contributions are outlined in the overview of the case studies.

—Greg Pronevitz and Valerie Horton



CHAPTER 1

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Library Consortia Overview

Valerie Horton

“The idea that libraries should, in some way, find means of work cooperatively . . . is a deeply rooted concept in librarianship.”

J.W. KRAUS

No library stands alone. Library cooperation goes back to the 1880s and is a long-standing tenet of the profession. Collaboration is strongly rooted in most of our current activities. Even Harvard University has stated that no library is big enough or rich enough to go it alone anymore. In these days of scarce public resources, there is a strong belief that libraries need to justify every tax dollar received and that collaboration helps libraries extend the value of every dollar spent.

The Council on Library and Information Resources has detailed many recent collaborative efforts in its report *Higher Ground: Building a Strategic Digital Environment for Higher Education*. The report states that “the next two decades could witness an extraordinary fluorescence of activity among universities and colleges focused on repositioning, consolidation, and convergence.” Collaboration is not just flourishing in academia, but also in public libraries as demonstrated by the number of libraries joining cooperatively managed e-book systems. Further, a new journal, *Collaborative Librarianship*, had over 250,000 articles downloaded in its first five years. The tool that libraries most often use to launch and manage collaborative projects is the library consortium.

This book covers the history, current landscape, management, critical trends, and key services that define today's library consortium. The book was written to help new library staff understand the full range of activities that take place in a modern consortia and to help consortia managers, participants in consortial governance, and participating libraries look for ways to revise current practices, expand services, or adopt new project ideas.

Chapter 2 highlights the current trends impacting consortia and the fiscal difficulties many have experienced since the 2007–2009 Great Recession. Chapters 3 and 4 look into current management trends and give an overview of wide-ranging consortia activities. Chapters 5 and 6 look at a key trend, the discovery-to-delivery continuum that allows us to maximize our patron services. Consortia's vital role in discovery to delivery is highlighted in these chapters. Finally, the 16 case studies selected for this book explore both the core services of consortia, such as support for integrated library systems and training, and new services, such as e-book technology and delivery methods.

In the spirit of library cooperation, we seek to share our 70 years of experience in libraries, including over 35 years managing five different library consortia in four states. We believe our experiences together with these important case studies will help the reader understand the dynamic and even revolutionary activities of today's library consortium.

What Is a Library Consortium?

"The word "consortium" is a good word for libraries. . . as it combines the past with the present and the future."

JAMES KOPP

Groups of collaborating libraries are called cooperatives, networks, collectives, alliances, and partnerships as well as consortia. The term *consortium* has been common in library literature for about 50 years. Clearly defining a library consortium can be a challenge given the diverse missions, roles, and memberships of these organizations. According to the U.S. *Code of Federal Regulations*, Sect. 54.500, a library consortium "is any local, regional, or national cooperative association of libraries that provides for the systematic and effective coordination of the resources of school, public, academic, and

special libraries and information centers, for improving services to the clientele of such libraries.” Dictionary definitions tend to focus on the “association” aspect of consortium, and on the goal of achieving some result beyond the resources of any single member.

Library consortia are as varied as the libraries they serve. Some consortia are international (OCLC), national (LYRASIS), regional (AMIGOS Library Services), or statewide (OhioLINK, Ohio’s academic network). Others serve smaller geographic regions or a single metropolitan area, such as Metropolitan Library Service Agency (MELSA). Library consortia range in size from huge—in 2012 OCLC had 22,599 members—to the very small, such as the Flatirons Library Consortia, which has three members. Consortia can be geared towards one type of library or serve multiple types of libraries. Consortia also vary from informal groups to government-sponsored organizations to nonprofit incorporated entities. Library consortia taxonomies can be based on governance structure, geographic service area, or the type of libraries served. This book looks at all types of library consortia and gives examples from many different types and sizes of organizations.

The activities of consortia are as varied as their types and sizes. These activities tend to focus around the following clusters of activities:

Components of Discovery to Delivery

- resource sharing, interlibrary loan, online and physical delivery
- shared offsite storage, cooperative collection development, serials exchange coordination, shared e-book collections
- shared integrated library systems, technology and networking support and service, Internet service provider
- digitization programs and hosting digital assets, institutional repositories

Group Purchasing Activities

- shared database purchases, cooperative purchasing of supplies, materials, and equipment

Library Empowerment Activities

- training, continuing education, professional development, consulting

Other consortia services include virtual reference, library marketing and graphic materials creation, advocacy, human resources management, fiscal support, publications or e-mail group support, videoconferencing, meeting-room facilities, and summer reading programs. The next chapters and the case studies will go into more detail about consortia activities.

Consortia History

“The history of library cooperation is as long as the history of professional librarianship in America.”

ADRIAN ALEXANDER

The American Library Association (ALA) was an early pioneer of collaborative library work. In 1876, ALA formed the Committee on Cooperation in Indexing and Cataloguing College Libraries. ALA also supported shared collections acquisition by 1913. The first interlibrary loan code was adopted in 1917. By World War II, librarians had shifted their focus to creating national and regional union catalogs. These union holding lists were important projects for library cooperation over the next thirty years.

In 1972, the U.S. Department of Education commissioned the first study to try to understand how the new cooperative models were developing. The *Directory of Academic Library Consortia* listed 125 academic consortia that had been formed since 1931; 90 percent of them were created after 1960. The study found that the need to streamline cataloging and to introduce rudimentary automation systems were the driving forces in early library consortia development. In 1996, James Kopp argued that many of the activities of the early consortia, such as reciprocal borrowing, interlibrary loan, union catalogs creation, and delivery services, were still taking place.¹

The Triangle Research Libraries Network (TRLN) was an early and illustrative consortium. TRLN was founded in 1933 to share cataloging and collections between Duke University, North Carolina State University, and University of North Carolina. Later North Carolina Central University

joined. Given their close proximity, the libraries have coordinated their materials acquisitions over many decades, enabling them to build collections that were up to 70 percent unique. TRLN was also at the forefront of many pioneering efforts in resource sharing and licensing of online resources. TRLN's Principles of Cooperation state the organization's focus is to develop a comprehensive shared collection as well as integrated discovery and delivery. TRLN is deepening its commitment to collaboration by working on shared digital initiatives, joint staffing models, and cooperatively held remote collections.

During the heyday of consortia development in the 1960s and 1970s, three large-scale bibliographic utilities were created: OCLC, the Western Library Network (WLN), and the Research Libraries Information Network (RLIN). All three organizations provided online access to bibliographic databases, which libraries used for cataloging, acquisitions, reference, and interlibrary loan. By 2006, RLIN and WLN had merged with OCLC. Multistate networks were also formed in this era, many in support of OCLC activities. These networks included Amigos Library Services, NELINET, PALINET, and Minitex. Many of these networks started as academic-only consortia but later expanded membership to serve all types of libraries.

The 1970s were also when regional library systems were developed, with about half the states creating these systems. Some regional systems were defined by the types of library they served. For instance, New York created separate systems for school, public, and academic libraries. Other regional systems had a mission to serve all types of libraries within a specific geographic area. In many states, the regional systems were charged with expansion of public library service into underserved rural areas. Most regional systems focused on library development and projects that were bigger than any one library could handle alone, such as a regional cataloging center or a shared resource-sharing system. Regional systems activities included consulting, technology assistance, joint online catalogs, and continuing education.

From the 1990s through the first decade of the twenty-first century, a second wave of consortia growth took place, driven by Internet access to online resources and databases. Along with this second wave of new consortia creation, many established consortia became larger both in budgets and in the number of participating libraries. By negotiating for group

purchasing with database vendors, many of the existing multistate consortia and networks grew into mega-consortia, managing database access for hundreds, if not thousands, of libraries. One example is the Big Deal packages that focused on acquiring vast numbers of costly scholarly journals for hundreds of libraries at the same time. In contrast, niche consortia were also being created at this time to meet the needs of small, more unique groups of libraries. Niche consortia are typically small and serve a specific function, such as delivery, or have a limited geographic setting, such as metro-area libraries only, or they provide specialized online resources such as medical resources.

In 2007, a large ALA study of 240 consortia found a strong and growing library consortia landscape. The *Library Networks, Cooperatives, and Consortia Survey* (LNCC) found that consortia were defined as regional (61%), local (26%), or statewide (12%) boundaries.² Most consortia in the survey were multitype and were within clearly defined geographic limits. The five chief services found in that 2007 survey were:

1. Resource sharing/interlibrary loan
2. Communication
3. Professional development/continuing education
4. Consulting and technical assistance
5. Cooperative purchases (primarily databases)

Other less frequently mentioned services included automation (networking, technical support, and online catalogs), advocacy, information and referral services, courier and online document delivery services, support for standards, support for special populations, professional collections, rotating or shared collections, and digitization.

The Great Recession hit in late 2007, and library consortia headed for a period of retrenchment. Research for this book found that 21 percent of consortia surveyed in the LNCC have closed or merged. Among the big news stories during this time was the collapse and merger of several former OCLC service networks into LYRASIS and the closure of others.

Less well known was the devastating loss of regional library systems across the country. Details of those closures can be found in chapter 2. After the recession government funding was scaled back, causing many consortia to lose some or all federal or state funding. As libraries lost their funding base, they found it increasingly difficult to continue participating

in cooperative ventures. By 2009, librarians were warned that “consortia cannot survive if ‘business as usual’ is the mandate during this economic downturn.”³ Conversely, a number of new international consortia had formed during this period. It is a paradox that library consortia are needed most in hard economic times to leverage library spending, but they are also most vulnerable at those times.

The authors of this book conducted a study of consortia, which is detailed in the next chapter. They found some good news. As the American economy improved over the past few years, fewer consortia closed. Some of the merged consortia are doing well, sometimes picking up new work from the closure of nearby organizations. Also, new consortia continue to be formed as economic pressures drive more libraries to collaborate. However, this is still a difficult time for library consortia, as public funding options remain limited and grants will only take an organization so far. It is likely that the next decade will continue to be a time of struggle for library consortia, and further consolidation is possible.

Why Do Libraries Join Consortia?

“I firmly believe that collaboration . . . is crucial to the continued success of libraries.”

THOMAS A. PETERS

Libraries have myriad reasons for joining consortia. In 2012, OCLC surveyed over 100 consortia managers for its report *U.S. Library Consortia: A Snapshot of Priorities & Perspectives*. Professional networking was considered the most valuable aspect of joining a consortium by 30 percent of managers who responded, while 23 percent thought cost saving was the most valuable. In a recent Minitex survey of its stakeholders, many respondents mentioned the value of networking, commenting about how the cooperative should “bring libraries together” and “facilitate conversations . . . to share ideas about what we are all doing locally,” and “stay focused on bringing people together.” In the press of too much to do and too little money to do it with, managers can forget how important networking time is for library staff and how well suited library consortia are to provide this function.

From a philosophical perspective, libraries join together to advance research and learning as well as to expand access to wider resource pools. Other reasons to cooperate include sharing continuing education and

obtaining expertise in high-cost staff areas such as technology. Prestige can play a role as well. Academic libraries that join the Committee on Institutional Cooperation (CIC) gain both prestige and access to a wealth of resources and supported services. Many libraries are members of numerous consortia; for example, North Carolina State University is a member of nine different consortia, Atlanta University Center belongs to seven, and Claremont College Library belongs to five. This proliferation of participation in consortia is not without detractors. Paula Kaufman, a dean at the University of Illinois at Urbana-Champaign wrote, “My institution belongs to so many [consortia] that it is nearly a full-time job to sort out what products and services each offers at what price and with what conditions.”⁴

There are many reasons to cooperate, but one of the most critical reasons to join a library consortium is to obtain economies of scale. The Big Deal packages that group hundreds of academic libraries into negotiations with scholarly journal vendors is one of the strongest examples of libraries gaining substantial saving through cooperation, though these deals also are not without their detractors. The digitization efforts through HathiTrust could not be accomplished without 100 institutions pooling their resources, nor would the pioneering work of the Digital Public Library of America (DPLA) be possible without the contributions of many library consortia.

In 2011, Marshall Breeding in his annual automation marketplace article predicted that we would see greater participation in ever larger integrated library systems (ILS) run by consortia. Breeding’s prediction has been validated by public libraries in Colorado. Prior to 2009, 34 percent of the state’s public libraries were part of a shared ILS or a union catalog system; by 2013 that number was over 60 percent. There are significant advantages to a library in joining a shared catalog, including a decreased need for in-house equipment or staff expertise, access to an integrated resource-sharing system, and learning and sharing the wisdom of the collaborative.

Any review of the literature will quickly show that joining a library consortium is not always cheaper. Collaboration is time consuming and can be a drain on staff time and resources. For instance, one library consortium may offer a top-of-the-line, vendor-based integrated library system while another consortium offers a less expensive and less developed open-source system such as Koha or Evergreen. The cost of membership in these systems is substantially different. A number of academic libraries have formed

a consortium to create an academic, high-end, open-source integrated library system called Kauli Ole.

The development costs for such a system are high, but the participating organizations gain a system in which they control the design and development of the product. Cost is not the driving factor for all libraries that participate in shared activities, but it is one of the most important considerations.

As previously stated, consortia are not without their detractors. Kaufman has raged that the time and energy spent dealing with consortia issues can be a mini-nightmare. Library literature is replete with articles from the late 1990s and early 2000s on the inefficiencies of some early library consortium projects.⁵ Major criticisms include the confusing number of consortia database offerings, too many meetings, too little agreement, too much time required, and too many delays in launching new technology-based systems. Additionally, many directors have expressed concern about joining a consortia effort when those efforts may not be sustainable, thereby creating a self-fulfilling prophecy.

Interestingly enough, in the past ten years a counterargument has developed. Many library leaders are now saying that the mistake made by those earlier pioneers was not putting in enough time or resources into cooperative efforts. While there is evidence that passive collaboration fails, we are seeing increasing evidence that deep collaboration succeeds. In an editorial for *Collaborative Librarianship*, this author defined deep collaboration as “two or more people or organizations contributing substantial levels of personal or organizational commitment, including shared authority, joint responsibility, and robust resources allocation, to achieve a common or mutually beneficial goal.”⁶

If one looks at some of the new deep collaborative projects, such as Kauli OLE, DPLA, or HathiTrust, one can see direct evidence of success. Further, consortia such as TRLN and Orbis Cascade are gaining profound new levels of deep cooperation from their members. Library directors are now saying we need to commit more time, money, and staff resources if we wish to transform libraries to meet the demands of the new information era.

Conclusion

Library consortia have been through periods of growth and retrenchment. Remaining relevant to participating libraries is one of the most crucial

considerations for library consortia. Many consortia are at the forefront of deep collaborative projects that are transforming the library landscape. It is the power of the collective that allows for projects with enough scope to change the norms under which have libraries have operated for a long, long time. Consortia allow a place for experimentation and change, and allow creativity to be unleashed and explored.

Today's consortia are far from the glorified buying clubs they were in the past. Chapter 2 highlights many services that libraries receive from consortia, proving that consortia activities have become crucial for many libraries. Library cooperatives help libraries become more productive and offer more resources to patrons. In the end, the reason so many libraries join together is to achieve more than any library can achieve on its own. The era of the library consortia is not ending; instead it is set for a transformation as technology has removed many of the physical barriers to collaboration that distance formerly created.

Notes

1. James Kopp, "Library Consortia and Information Technology: The Past, the Present, the Promise," *Information Technology & Libraries* 17, no. 1 (March 1998).
2. Denise Davis, "Library Networks, Cooperatives and Consortia: A National Survey," *ALA Report* (December 3, 2007), www.ala.org/offices/sites/ala.org.offices/files/content/ors/lncc/interim_report_1_may2006.pdf.
3. Katherine Perry, "Where Are Library Consortia Going? Results of a 2009 Survey," *Serials* 22, no. 2 (July 2009): 126.
4. Paula A. Kaufman, "Whose Good Old Days Are These? A Dozen Predictions for the Digital Age," *Journal of Library Administration* 35, no. 3 (2001): 13.
5. Thomas A. Peters, "Consortia and Their Discontents," *Journal of Academic Librarianship* 29, no. 2 (March 2003).
6. Valerie Horton, "Going 'All-in' for Deep Collaboration," *Collaborative Librarianship* 5, no. 2 (2013): 66.

About the Authors and Contributors

Valerie Horton has been director of Minitex since December 2012. Minitex serves Minnesota, North Dakota, and South Dakota libraries with a large resource-sharing network, databases, continuing education, remote storage, and many other services. Horton is also the co-general editor for *Collaborative Librarianship*, and wrote *Moving Materials: Physical Delivery in Libraries* for ALA Publications. Prior to working at Minitex, she was the first director of the Colorado Library Consortium (CLiC), a statewide library service organization. Before CLiC, Valerie was Director of the Library at Mesa State College in Grand Junction for seven years. She came to Mesa State after ten years at New Mexico State University, where she was Head of Systems, and for a time, library budget director/associate director. During her tenure in New Mexico, Valerie received an ALA International Fellowship and spent a year in the Republic of Trinidad and Tobago, where she consulted on how to automate the country's public, school, and government libraries. She started her professional career as a systems librarian at Brown University in Providence, Rhode Island, after graduating from and working in Systems at the University of Hawaii.

Greg Pronevitz was appointed founding executive director of the Massachusetts Library System (MLS) in 2010 after budgetary pressures compelled the consolidation of six regional library systems. MLS serves more than 1,500 multitype members with physical delivery, shared e-content, training and professional development, consulting, mediated interlibrary loan and document delivery services. He speaks and writes in the areas of physical delivery service, shared online content, and digital libraries. Prior to the formation of MLS, Pronevitz had extensive experience as founding director, managing the provision of services to libraries in a consortial environment at the Northeast Massachusetts Regional Library System

and as assistant director at OHIONET. His professional library experience includes positions in technical services at Ohio State University, Chemical Abstracts Service, and the Center for Research Libraries, where he began his career as a cataloger for Slavic materials. He received an MLS (including two semesters of study on a graduate student exchange with Moscow State University in the former Soviet Union) and a BA in Russian language and literature from the State University of New York at Albany.

Lori Bowen Ayre is a library consultant specializing in library delivery systems, materials handling, and all the technology and equipment that comes into play in optimizing these systems. She has written extensively about the use of RFID and is a frequent presenter on RFID as well as automated materials handling, interlibrary delivery, resource sharing, and open-source software. Ayre writes the Technology Matters column in *Collaborative Librarianship* and has contributed chapters to *Moving Mountains: Physical Delivery in Libraries* and *RFID-Applications, Security and Privacy*. She has also written two issues of *Library Technology Reports*. She received her master's degree in library and information science from San Jose State University in 2006.

Liz Bishoff is currently the owner and principal consultant for The Bishoff Group, a library and cultural heritage consulting services organization. Previously Bishoff was the director of Digital and Preservation Services at the Bibliographic Center for Research, where she worked closely with organizations as they developed and managed their digital program. Bishoff was also vice president for Digital Collection Services at OCLC and founding executive director of the Colorado Digitization Program. Under several IMLS National Leadership Grants, Bishoff led the development of collaborative best practices in metadata and digital imaging, resulting in the widely adopted CDP Metadata Dublin Core Best Practices and the Digital Imaging Best Practices.

Linda Crowe is the executive director of Califa Group, a statewide California library consortium. Califa is responsible for purchasing electronic resources, hardware, and software, and administering the program for its 220 member libraries. She is also chief executive officer of the Pacific Partnership, a consortium covering eight California counties. The Pacific Partnership prepares and monitors the budget, organizes programs, and

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Kathleen Drozd is assistant director of Minitex, which is located at the University of Minnesota, Twin Cities. Minitex is an information and resource-sharing program of the Minnesota Office of Higher Education and the University of Minnesota Libraries. Her responsibilities have included direction of the Minitex Delivery System, which serves Minnesota and the Dakotas. She also directs the Minnesota Library Access Center, a remote storage facility for 21 libraries. Drozd has served on the NISO Physical Delivery of Library Resources Working Group, which authored a best practices document published in January 2012.

Randy Dykhuis is executive director of the Midwest Collaborative for Library Services, a nonprofit membership organization that provides libraries in Michigan and Indiana with a convenient single point of contact for training, group purchasing, and technical support for electronic resources. He is the author of the 2009 article, "Michigan Evergreen: Implementing a Shared Open-source Integrated Library System," which was published in *Collaborative Librarianship*. In 2003, Dykhuis won Wayne State University's Distinguished Alumnus award. He received his Master's in Library Science from Wayne State University, Detroit.

Jeanine F. Gatzke is a technical services librarian and associate systems administrator at Concordia University's St. Paul Library. She received her master's degree in library and information science in 2002 from Dominican University, River Forest, Illinois, in the joint program with the College of St. Catherine in St. Paul. She has served on a number of operational committees and communities of interest in all areas of technical services throughout her 18-year history with Cooperating Libraries in Consortium (CLIC).

Deborah Hoadley is advisor and team leader for the MLS Statewide eBook Pilot Project at the Massachusetts Library System in Marlborough. Her primary focus is strategic planning, leadership, collaborations/partnerships, and more recently, resource sharing. She is the president of the New England Library Association, where she is working to bring the six New

England states together to work cooperatively on resource-sharing projects. Hoadley has presented at local, state, and regional conferences on the areas of advocacy, planning, leadership, and consortial e-books. In 2011, she received the YWCA Tribute to Women Award for building strong connections between the public library, the town, and the community

Jennifer Hootman is coordinator of Reference Outreach & Instruction at Minitex. She works with library staff, educators, and students to provide instruction and support for the statewide e-resources. Her areas of interest and experience include the design and development of instructional materials and online tutorials, e-learning/teaching, instruction of first-year university students and students in grades 6–12, curriculum development, and professional development for library staff and educators. Hootman earned an MA in history at Illinois State University and an MLIS from the University of Illinois at Urbana-Champaign.

Anne R. Kenney is the Carl A. Kroch University Librarian at Cornell University in Ithaca, New York. Her research has focused on digital imaging, digital preservation, and more recently, collaborative organizational responses to 21st-century challenges. She is the coauthor of three award-winning monographs and over 50 scholarly articles and reports. Kenney is a fellow and past president of the Society of American Archivists and serves on the board of the Association of Research Libraries. She has received numerous awards for her research, teaching, and service to the profession. Kenney earned her master's degrees in history and library science at the University of Missouri.

Belinda E. Lawrence is the public access librarian at the St. Catherine University library. She received her master's degree in library science in 2002 from Dominican University, River Forest, Illinois. She has served on several committees in CLIC over the past 15 years and also participated in the migration and implementation of CLIC's shared ILS. Lawrence's research is concentrated on student employees and their role in libraries. She coauthored with Kate Burke the article "Accidental Mentorship: Library Managers' Roles in Student Employees' Academic Professional Lives," *College & Research Library News* 72 (February 2011): 99–103.

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