

Description of the Montana Shared Catalog

Background: The Montana Shared Catalog (MSC) represents both a library consortium and a shared Integrated Library System (ILS). Created in 2002 with the participation and financial commitment from 17 initial, multi-type libraries, the MSC now includes 140 Montana libraries.

The specific ILS is SirsiDynix Symphony and the modules include Circulation (checkout, checkin, holds management, bills management and patron management), Cataloging (creating and maintaining titles and items, importing new titles from OCLC's WorldCat database where needed), Serials Control (creating and managing journal subscriptions, subscription claims and processing) and Acquisitions (creating and maintaining records for purchases from book jobbers and vendors for new collection materials, tracking and claims). Additional modules: Outreach, Booking, Reserves, Selection, ILL and Reports are also included. Delivery of the ILS is based on a "client-server" architecture: the State Library hosts an IBM Power 520 Express server as the production and an IBM P650 development server. The production server stores all the data and provides the operating system for the ILS. The participating libraries download the java client needed to access and use the system. The patron or student sees what is called eLibrary, which is a web-based user interface. There is, additionally, Director's Station, which is a web-based application that runs on its own server, allowing library directors and staff to query the system's history logs for statistical information on circulation, cataloging, acquisitions and user activity. A large storage area network (SAN) provides hard disk storage (backup). A run-time version of Oracle is the database underlying the Symphony application.

The MSC is also a library consortium. MSC libraries are found in more than 80 Montana communities, serving a combined population of approximately 500,000 and over 300,000 registered users. The MSC currently includes 5 academic libraries, 76 public libraries and branches, 46 school or school branch libraries, and 12 special library members, stretching across the state from Eureka to Baker and Darby to Plentywood. Over 400 library staff across the state, share the system and their expertise with each other, creating a kind of virtual staff for all libraries involved. Forty-one libraries in the MSC have selected to share user circulation privileges between each other, moving materials placed on hold by their patrons back and forth using local courier solutions. Several of these libraries also offer "floating collections", where material that is sent between libraries stays on the receiving library's shelves until another hold is placed. This offers the participating libraries new material on a rotating basis. Finally, MSC libraries benefit from cost sharing beyond the cost of the system, currently in the areas of shared E-book collections, support staff and licenses required for authentication into MontanaLibrary2Go.

State Library staff work to make the MSC the best shared online library catalog it can be. Policies and budgets are set by the membership, in partnership with MSL. MSC members assist with training and ongoing support. Decisions about implementation details (cataloging, circulation, interface customization) are made by membership committees. The MSC membership has final approval of the consortium's budget and shared cost formula.

Costs

There are two types of costs associated with the MSC: startup and ongoing. Startup costs for new libraries joining the consortium are largely covered by LSTA, provided by the State Library. Startup costs covered by LSTA include:

- Vendor cost to create the new library in the ILS
- Vendor cost to convert and migrate bibliographic and patron records from a library's former ILS to the new ILS, if the joining library wishes to migrate records
- Vendor costs for project management and implementation
- Vendor costs for loading bibliographic and patron records for the new libraries

Startup costs that are direct costs to a new library include:

- Cost of re-barcoding the physical items in their collection, if the library is a circulating library and their existing barcodes are not the required standard for MSC libraries¹
- Cost of contributing to Authority record maintenance (pro-rated and based on number of incoming bibliographic records or items)
- Peripheral costs: barcode scanners, receipt printers if needed
- SIP license costs: to provide those number of SIP licenses needed, by product (self-check machines, time management services, debt collection, authentication to outside resources such as MontanaLibrary2Go)²

Ongoing costs for the MSC are covered largely by the existing libraries, under a cost sharing model. The cost sharing model is based on title (30%), circulation (10%) and patron (30%) record counts that come directly from the system. The remaining 30% is divided equally among libraries. The following breaks are included:

- i. Title record break – libraries with under 10,000 titles records receive a 5,000 title break
- ii. Patron record break – libraries with under 3,000 patron records will not be charged for patron records
- iii. Equal share of 30% - libraries with under 8,000 title records AND under 1,000 patron records will pay a lower percentage that equals 1% of the 30%. The other libraries share the remaining balance equally.

¹ MSC barcodes for circulating libraries must be 14 digit, Codabar Mod 10, ending in a checksum digit. Patron IDs must begin with 2. Item IDs must begin with 3. The following 4 digits must be a unique, 4 digit library identifier assigned from the Montana Barcode Registry which is maintained by the State Library.

² MSC libraries sharing an external resource which requires a SIP license normally share the cost of a single license for that purpose, greatly reducing the cost each library bears. The MontanaLibrary2Go SIP license for the MSC is an example.

The members' shared MSC expenses for FY 2012 are:

SirsiDynix annual maintenance	\$	134,539.86
SirsiDynix eLibrary (includes content)	\$	50,087.05
EzProxy License (SIP/OCLC)	\$	228.80
Server HW maintenance, p520 p650	\$	6,500.00
Embedded Oracle Annual Support	\$	5,103.60
Director's Station annual subscription	\$	12,600.11
Server Location Costs	\$	0.00
Server replacement	\$	5,000.00
LTI Authority	\$	5,000.00
Catalog cleanup	\$	5,000.00
MSC Training, meetings, conferences	\$	18,000.00
1 FTE plus .66 FTE MSC Staff	\$	68,000.00
Total Shared Costs	\$	317,729.42

Minus \$98,885.50 contribution from the state = \$205,243.59 paid by the members.

Other costs are individual library costs: SirsiDynix annual fees for branch maintenance, a debt collection module and several individual SIP licenses held by particular libraries that amount to a total of \$14,682.72.

LSTA from the State Library provides the funding for these MSC ongoing costs:³

- MSC Director (1 FTE): \$64,839
- MSC Information Specialist (1 FTE): \$75,647
- MSC Technical Assistant (.33 FTE): \$22,717

The chart below shows the estimated ongoing cost levels for member libraries:⁴

Library Size	FY 2010	FY 2011	FY 2012
Small with no circulation	\$ 680	\$ 730	\$ 625
Small with circulation	\$ 1,300	\$ 1,500	\$ 1,300
Medium low circulation	\$ 2,500	\$ 2,800	\$ 2,000
Medium with high circulation	\$ 5,000	\$ 5,000	\$ 4,500
Large with circulation*	\$ 32,000	\$ 26,000	\$ 21,000

³ Figures are as of projected LSTA FY 2010 preliminary budget

* Definition of 'larger library'—Having both 100,000 or more bibliographic records, and 25,000 or more service area population (or over 15,000 full-time-equivalent students, staff, and faculty). Definition of 'middle-sized library'—Having 35,000 to 100,000 bibliographic records, and 10,000 to 24,999 service area population (or 5,000 to 14,999 full-time-equivalent students, staff, and faculty). Definition of 'smaller libraries'— Not a "Larger or a Medium Library". Counts for library systems or consortium are figured as the sum of their individual counts. Medium low circulation accounts mostly for schools and school districts due to summer closure.

* Note that in FY11, there are only 5 “large” libraries and that they cover a little more than half of the annual cost for the entire catalog. Costs decrease during and after 2011 due to contribution from the state general fund.

Concluding points: The MSC provides these products, hardware and services to libraries:

- Symphony Integrated Library System for Consortia
- e-Library
- Yearly Authority record maintenance
- Directors Station
- NetLibrary collections
- Monthly uploads of additions and deletions to OCLC
- Yearly cleanup of OCLC holdings
- Yearly indexing cleanup of catalog records
- Centralized system administration including daily backup
- 24 x 7 system and software technical support
- IBM production and development servers
- Staff training
- The ability to open user walls in the system for sharing circulation privileges
- Interoperability standards such as SIP, NCIP and screen scraping
- The ability to participate in floating collections
- Networking with peers and colleagues

Download the document to see the current member libraries and branches of the Montana Share Shared Catalog.



MSC Member
Libraries 2011