

## 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 libraries, the MSC now includes 164 multi-type, Montana libraries.

The integrated library system (ILS) currently in use by the MSC is SirsiDynix's Symphony. System 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. The ILS is based on "client-server" architecture. The State Library hosts an IBM Power 520 V9 Express server as the production server 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 "Workflows" client to their staff workstations needed for staff to access and use the system. Symphony's "e-Library" is a web-based user interface for patrons and students to use for searching the catalog, creating and managing their library accounts, placing holds and renewing checked out items. The "Web Services" module includes applications that patrons can use to interface with the catalog on their mobile devices and in library Facebook pages. There is, additionally, Director's Station: 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 400,000 registered users. The MSC currently includes 5 academic libraries, 80 public libraries and branches, 67 school libraries, and 12 special library members, stretching across the state from Troy to Baker and Plentywood to Lima. Over 400 library staff members share the system and their expertise with each other, creating a kind of virtual staff for all libraries involved. Forty-four libraries in the MSC have selected to share user circulation privileges between each other, moving materials back and forth using local courier solutions to fill holds placed by their patrons. Several of these libraries also offer "floating collections", where materials that are sent between libraries stay 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 with; shared E-book collections, hardware and support staff costs, and licenses required for authentication into the Statewide Databases and 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 are occasionally asked to assist with training, cataloging, 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 that can be 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 libraries (Codabar 14-digit, mod 10 with check digit calculation)
- Contributing to the new library training costs, currently \$300 per library.
- Peripheral costs, if needed, such as; additional workstations, network equipment, broadband internet connection, barcode scanners, receipt printers.

Ongoing cost: The state contributes \$98,550 to the MSC's annual operational costs which accounts for about 1/3 of the total annual, ongoing cost. The remainder is paid by the member 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% equal share. The other libraries share the remaining balance equally.

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

- Symphony Integrated Library System for Consortia
- e-Library end user interface and Enterprise discovery interface
- Web services enabling mobile device and Facebook apps for the catalog
- Quarterly Authority record maintenance
- Directors Station
- Ebsco Host e-book and Project Gutenberg collections
- Monthly uploads of additions and deletions to OCLC holdings
- 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 Z39.50, SIP and NCIP
- The ability to participate in floating collections
- Networking with peers and colleagues

Click [here](#) to see the current member libraries and branches of the Montana Share Shared Catalog.