

Description of the Montana Shared Catalog  
Provided to the Montana State Library Commission  
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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 nearly 100 Montana libraries.

The specific ILS is SirsiDynix Symphony and the modules include Circulation (checkout, checkin, holds management, 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 two RS/6000 IBM UNIX (AIX) servers (a production and a development server) which store all the data and provide the operating system for the ILS, and the participating libraries download the software or client needed to access and use the system. The patron or student sees what is called iBistro or iLink, collectively called "e-Library", 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 70 Montana communities, serving a combined population of approximately 450,000 and over 300,000 registered users. The MSC currently includes 4 academic libraries, 55 public libraries or public library branches, 29 school or school branch libraries, and 11 special library members, stretching across the state from Troy to Miles City and Darby to Froid. 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. 27 libraries or branch 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 rebarcoding 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<sup>1</sup>
- 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)<sup>2</sup>

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.

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<sup>1</sup> 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.

<sup>2</sup> 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 2010 are:

SirsiDynix annual maintenance	\$	89,156.43
SirsiDynix iBistro and iLink	\$	35,473.09
Test Server	\$	-
Server HW maintenance, p650 p615	\$	6,500.00
Embedded Oracle Annual Support	\$	4,599.17
Director's Station annual subscription	\$	11,354.72
Server Location Costs	\$	2,500.00
Server replacement	\$	5,000.00
LTI Authority	\$	6,500.00
Catalog cleanup	\$	10,000.00
MSC Training, meetings, conferences, etc.	\$	14,500.00
1 FTE plus .5 FTE MSC Staff	\$	40,000.00
Total Shared Costs	\$	225,583.41

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 \$9,851.

LSTA from the State Library provides the funding for these MSC ongoing costs:<sup>3</sup>

- MSC Director (1 FTE): \$64,839
- MSC Information Specialist (1 FTE): \$75,647
- MSC Technical Assistant (.5 FTE): \$23,773

The chart below shows the estimated ongoing cost levels for member libraries:<sup>4</sup>

<b>Library Size</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>
Small with no circulation	\$ 625	\$ 680	\$ 730
Small with circulation	\$ 1,100	\$ 1,300	\$ 1,500
Medium with no circulation	\$ 2,100	\$ 2,500	\$ 2,800
Medium with circulation	\$ 4,500	\$ 5,000	\$ 5,000
Large with circulation*	\$ 30,000	\$ 32,000	\$ 26,000

\* Note that in FY09/10, there are only 3 "large" libraries and that they cover nearly half of the annual cost for the entire catalog. Costs will decrease somewhat for "large" libraries in 2011 due to the addition of another large library to the catalog.

<sup>3</sup> Figures are as of projected LSTA FY 2010 preliminary budget

<sup>4</sup> 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

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

- Symphony Integrated Library System for Consortia
- e-Library (Bistro/iLink public interface)
- 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

These libraries and branches are members of the Montana Shared Catalog, as of Fall, 2009:

<b>City</b>	<b>Library</b>	<b>Library Type</b>
Alberton	Alberton School Library	School
Anaconda	Hearst Free Library - Anaconda	Public
Ashland	Ashland Public School	School
Belgrade	Belgrade Community Library	Public
Big Timber	Carnegie Public Library	Public
Big Timber	Big Timber Grade School	School
Big Timber	Sweet Grass County High School	School
Bigfork	Bigfork Branch Library (Flathead Co.)	Branch
Bigfork	Bigfork K-8 School	School
Bigfork	Bigfork High School	School
Billings	Parmly Billings Library	Public
Billings	Saint Francis Primary School Library	School
Billings	Saint Francis Intermediate School Library	School
Billings	Saint Francis Upper School Library	School
Billings	Billings Central Catholic High School Library	School
Billings	Billings Clinic Medical Library	Special
Billings	PLUK Library	Special
Boulder	Boulder Community Library	Public
Box Elder	Stone Child College Library	Academic
Bozeman	Montana Bible College Library	Academic
Bozeman	Bozeman Public Library	Public
Bridger	Bridger Public Library	Public
Clancy	Clancy Community Library (Jefferson Co.)	Branch
Clinton	Clinton School	School
Colstrip	Bicentennial Library of Colstrip (Rosebud Co.)	Branch
Columbia Falls	Columbia Falls Branch Library (Flathead Co.)	Branch
Condon	Swan Valley Branch Library (Missoula Co.)	Branch

Culbertson	Culbertson Public Library (Roosevelt Co.)	Branch
Darby	Darby Community Public Library	Public
Dillon	Dillon Public Library	Public
Drummond	Drummond School Community Library	Public
Ennis	Madison Valley Public Library	Public
Eureka	Eureka Branch Library	Branch
Eureka	Lincoln County High School	School
Forsyth	Rosebud County Library	Public
Frenchtown	Frenchtown School & Community Library	Branch
Froid	Froid Branch Library (Roosevelt Co.)	Branch
Glasgow	Glasgow City-County Library	Public
Glendive	Glendive Public Library	Public
Hamilton	Bitterroot Public Library	Public
Hardin	Big Horn County Public Library	Public
Helena	Montana State Library	Special
Helena	Montana Department of Transportation Library	Special
Helena	Montana State Genealogical Society	Special
Helena	Montana Historical Society Research Center	Special
Helena	State Law Library of Montana	Special
Helena	Montana Legislative Reference Center	Special
Helena	Montana Office of Public Instruction	Special
Helena	Montana Public Service Commission	Special
Highwood	Highwood School	School
Joliet	Joliet Public Library	Public
Kalispell	Flathead Valley Community College Library	Academic
Kalispell	Flathead County Library and Branches	Public
Kalispell	Kalispell Regional Medical Center Library	Special
Laurel	Laurel Public Library	Public
Lewistown	Lewistown Public Library	Public
Libby	Lincoln County Public Libraries	Public
Lima	Lima Public School	School
Livingston	Park High School	School
Manhattan	Manhattan Community Library	Public
Marion	Marion Branch Library (Flathead Co.)	Branch
Marion	Montana Academy	School
Miles City	Miles Community College Library	Academic
Miles City	Miles City Public Library	Public
Miles City	Pine Hills Youth Correctional Facility	School
Missoula	Missoula Public Library and Branches	Public
Missoula	Hellgate Elementary School K-2	School
Missoula	Hellgate Intermediate School 3-5	School
Missoula	Hellgate Middle School 6-8	School
Missoula	Missoula International School	School
Philipsburg	Philipsburg Public Library	Public
Plains	Plains District Library	Public
Plains	Plains School K-12	School
Polson	Polson City Library	Public
Poplar	Poplar City Library (Roosevelt Co.)	Branch
Power	Power Public Schools	School
Red Lodge	Red Lodge Carnegie Library	Public

Roundup	Roundup School-Community Library	Public
Saint Ignatius	St. Ignatius School Community Library	Public
Seeley Lake	Seeley Lake Branch Library (Missoula Co.)	Branch
Sheridan	Sheridan Public Library	Public
Stevensville	North Valley Public Library	Public
Superior	Mineral County Public Library	Public
Thompson Falls	Thompson Falls Public Library	Public
Thompson Falls	Thompson Falls Elementary School	School
Thompson Falls	Thompson Falls High School	School
Thompson Falls	Thompson Falls Junior High School	School
Three Forks	Three Forks Community Library	Public
Troy	Troy Branch Library	Branch
Twin Bridges	Twin Bridges Public Library	Public
Virginia City	Thompson-Hickman County Library	Public
West Yellowstone	West Yellowstone Public Library	Public
West Yellowstone	West Yellowstone Public Schools Library	School
White Sulphur Springs	Meagher County/City Library	Public
Whitefish	Whitefish Branch Library (Flathead Co.)	Branch
Whitehall	Whitehall Community Library (Jefferson Co.)	Branch
Whitehall	Whitehall Public Schools	School
Whitehall	Whitehall K-8 Library	School
Wolf Point	Roosevelt County Library	Public