

Description of Montana OCLC Group Services
Provided to the Montana State Library Commission
by Sarah McHugh, MSL Statewide Projects Librarian
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Background: Founded in 1967, OCLC Online Computer Library Center is a nonprofit, membership, computer library service and research organization dedicated to the public purposes of furthering access to the world's information and reducing information costs. More than 71,000 libraries in 112 countries and territories around the world use OCLC services to locate, acquire, catalog, lend and preserve library materials.

Researchers, students, faculty, scholars, professional librarians and other information seekers use OCLC services to obtain bibliographic, abstract and full-text information when and where they need it. OCLC and its member libraries cooperatively produce and maintain WorldCat—the OCLC Online Union Catalog.

Membership in OCLC is a unique cooperative venture, giving libraries access to a wide range of services and databases, including WorldCat. Together OCLC member libraries make up the world's largest consortium.¹

Montana's OCLC Group Services

The Montana State Library was the first to initiate a “group services” approach to their OCLC contract. Since 2000, Montana libraries have been able to enroll in a suite of services with fixed, three year price levels. A local cost formula based on the distinction between “copy cataloging” and “full cataloging” libraries has enabled all sizes and types of Montana libraries to afford the suite of services. Other states have followed Montana's example, including Alaska, Idaho and Oregon.

The FY 2010 Montana OCLC Group Services enrollment breakdown by library type is as follows:²

215 main libraries and 33 branch libraries out of 752 libraries enrolled

- 21 academic libraries out of 26 enrolled
- 76 public libraries out of 80 enrolled
- 101 school libraries out of 560 enrolled
- 17 special libraries out of 49 enrolled

The State Library's current 2009-2011 Group Services contract with OCLC includes the services and costs listed in the chart below.

¹ Source: <http://www.oclc.org/us/en/about/default.htm>

² Total libraries and totals by library type come from the Montana Library Directory

Fiscal Year	FY09	FY10	FY11
15 SU WorldCat	\$41,160	\$41,160	\$42,395
UNLIMITED Cataloging (includes access)	\$315,243	\$314,982	\$322,857
UNLIMITED ILL (includes access)	\$120,815	\$120,715	\$123,733
BCR Surcharge = 16%	\$14,005	\$0	\$0
UNLIMITED Group Catalog	\$17,651	\$17,651	\$18,181
Total WorldCat, Cataloging, ILL and Group Catalog: Shared by Enrolled Libraries and the Gap covered by MSL	\$508,875	\$494,508	\$507,166
UNLIMITED CONTENTdm (Maintenance)		\$9,345	\$9,625
UNLIMITED CONTENTdm (Annual Fee)		\$3,780	\$3,893
Total UNLIMITED CONTENTdm Statewide Access (covered by MSL and MT Historical Society Research Center)		\$13,125	\$13,518
Question Point (covered by MSL and, in previous years, partially by Ask MT libraries)	\$8,121	\$16,242	\$16,729
Individual services covered by subscribing libraries but included within Group Services			
WCA_Montana State Univ Northern (YWR)	\$720	\$720	\$742
WCA_Montana State Univ Bozeman (MZF)	\$2,509	\$2,509	\$2,584
WCA_Univ of Montana Mansfield Libr (MTG)	\$4,292	\$4,292	\$4,421
WCA_Montana State Univ Great Falls - FY09 \$400. start up fee (YQY)	\$1,265	\$865	\$891
WCA_Butte Silver-Bow Pub Libr (MZE)	\$1,075	\$575	\$592
Total WorldCat Analysis	\$9,861	\$8,961	\$9,230
ILLiad_Montana State Univ Bozeman (MZF)	\$6,025	\$6,025	\$6,206
ILLiad_Univ of Montana Mansfield Libr (MTG)	\$4,819	\$4,819	\$4,964
Total ILLiad	\$10,844	\$10,844	\$11,170
TOTAL GROUP SERVICES (Utilizing 15 SU WorldCat Pricing)	\$537,701	\$543,680	\$557,813

- 15 SU WorldCat refers to 15 simultaneous cataloging “seats” available to all Montana libraries for purposes of full and copy cataloging
- Unlimited Cataloging includes access to the CatExpress and Connexion Client cataloging tools. There is no limit to the number of records or holdings Montana libraries can create.

- Unlimited ILL includes access to FirstSearch ILL, an online Interlibrary Loan service for creating ILL requests for both lending and borrowing purposes.
- The Group Catalog, previously known as “MLNCat” is now called MyMontanaLibrary Group Catalog. Libraries not enrolled in the Group Services contract have access to a limited “guest view” of the Group Catalog. Enrolled libraries are able to take advantage of scoping search capabilities and Interlibrary Loan configurations.
- The “Gap” payment from MSL to meet the total shared costs of the 15 cataloging seats, unlimited cataloging, unlimited ILL and the Group Catalog has averaged between \$30,000-\$50,000 depending on enrollment each fiscal year
- All enrolled libraries have access to WorldCat, WorldCat.org (a web portal for the WorldCat database) and WorldCat Local QuickStart (a limited version of WorldCat Local).
- All enrolled libraries can receive OCLC cataloging batch load and reclamation services free of charge, through the Group Services contract.
- CONTENTdm is digitization software, at an unlimited use level, used in the Montana Memory Project (MMP). The MMP is a statewide online digital access tool for institutions interested in digitizing historical and contemporary material such as photographs, maps, historical and government documents to make them available via the web, within a common portal, to users everywhere.
- QuestionPoint is the software and 24/7 coverage subscription for the statewide AskMontana service, a virtual reference service currently provided by 20 Montana libraries.
- The individual cost of WorldCat Collection Analysis (WCA) and ILLiad services subscribed to by the libraries listed in these columns is paid for by the libraries listed. These libraries have selected to roll these individual costs under the State's OCLC group services in order to receive the fixed, three year pricing.
- Statewide projects proposed to the MSL Network Advisory Council for consideration sometimes include other OCLC services. These services are currently not part of the Group Services contract. Products or subscriptions include OCLC's WorldCat Local which is currently being implemented by selected Montana libraries participating in a pilot, OCLC's Digital Archive, which has been recommended by the NAC as a statewide preservation solution for digital masters and OCLC's EZProxy software, which is a tool for patron authentication.

Covering the cost of the Montana OCLC Group Services contract

The Montana State Library Network Advisory Council has worked with State Library staff and OCLC to develop a cost sharing model that:

- Shares OCLC costs equitably among Montana libraries
- Raises enough money to meet our obligation to OCLC
- Is as affordable as we can make it for all Montana libraries

A yearly 4% increase has been built into the cost sharing model since 2004, in order to prepare for the next fiscal year's overall cost of the Group Services contract.

The local cost sharing model's pricing levels distinguish between "copy" and "full" cataloging libraries. OCLC set almost all of the full cataloging libraries' base prices in 2005. To our best knowledge, it remains the case that no lower price is available. Of the 215 enrolled Montana libraries, 19 are considered full cataloging libraries for cost purposes; these libraries (listed in bold below) pay about three-quarters of Montana's statewide contract costs to OCLC. Full cataloging libraries' participation in this statewide group catalog contract helps out hundreds of other Montana libraries.

The vast majority of Montana libraries enrolled in Montana OCLC group services are identified as copy level libraries for the purposes on the local cost model. Their FY 2010 OCLC Group Services enrollment cost levels are shown below.

Library Type	\$1,881	\$1,551	\$1,211	\$896	\$590	\$293
Academic	1000 fte students or more	800 fte students or more	600 fte students or more	400 fte students or more	200 fte students or more	Less than 200 fte students
Public	5 or more paid staff	4 or more paid staff	3 or more paid staff	2 or more paid staff	1 or more paid staff	Less than 1 paid staff
Public/School Combined*	See note below	See note below	See note below	See note below	See note below	See note below
School	3 OPI certified librarians required (enrollment based)	2.5 OPI certified librarians required (enrollment based)	2 OPI certified librarians required (enrollment based)	1.5 OPI certified librarians required (enrollment based)	1 OPI certified librarian required (enrollment based)	0.5 or less OPI certified librarian required (enrollment based)
Special	5 or more paid staff	4 or more paid staff	3 or more paid staff	2 or more paid staff	1 or more paid staff	Less than 1 paid staff

* Public/School combined libraries' fair share of the statewide OCLC contract has been determined to be their cost calculated as if they were either a school library, or a public library, whichever is higher. Being combined, these libraries do not have to pay the sum of their public and school shares; however, in the interest of statewide fairness and equity, they do pay the single higher amount.

Concluding Points: The Montana OCLC Group Services contract provides libraries with tools to:

- Catalog the original materials found in their local collections, contributing these bibliographic records to the WorldCat database and thereby presenting their collections to the world
- Add their library's holdings to existing WorldCat records and thereby presenting their collections to the world

- Provide lending and borrowing Interlibrary Loan services to their own patrons and the world's library patrons
- Search a statewide group catalog that is configured for levels of search results and seamless access to Interlibrary Loan requesting, for their own patrons and the world's library patrons
- Offer 24/7 virtual reference services to library patrons in Montana and around the world
- Catalog and upload scanned, digitized images of local material to the Montana Memory Project and WorldCat, for searching and retrieval by users worldwide

Enrollment in OCLC is ongoing and is updated with OCLC weekly. As of October 6, these Montana libraries were enrolled in FY 2010 Montana OCLC Group Services.

City	Library	Library Type	Enrollment Fee
Alberton	Alberton School Library	School	292.00
Alberton	Alberton Branch Library	Branch	0.00
Anaconda	Hearst Free Library	Public	1,211.00
Arlee	Arlee High School Library	School	292.00
Ashland	St Labre Indian Catholic School Library	School	292.00
Augusta	Lewis and Clark Library Augusta Branch	Branch	0.00
Baker	Baker Middle / High School Library	School	292.00
Baker	Fallon County Library	Public	1,211.00
Belgrade	Belgrade Community Library	Public	1,211.00
Belt	Belt Public Library	Public	292.00
Big Sandy	Big Sandy Branch Library	Branch	0.00
Big Timber	Carnegie Public Library	Public	895.00
Big Timber	Sweet Grass County High School Library	School	292.00
Bigfork	Bigfork High School Library	School	590.00
Bigfork	Bigfork K-8 Library	School	590.00
Bigfork	Bigfork Branch Library	Branch	0.00
Billings	Billings Clinic Medical Library	Special	590.00
Billings	PLUK Library	Special	590.00
Billings	MSU - Billings Library	Academic	20,061.00
Billings	Parmly Billings Library	Public	16,548.00
Billings	Ponderosa Elementary School	School	590.00
Billings	Poly Drive Elementary School	School	590.00
Billings	Burlington Elementary School	School	590.00
Billings	Broadwater Elementary School	School	590.00
Billings	Rose Park Elementary School	School	590.00
Billings	Riverside Middle School	School	895.00
Billings	Orchard Elementary School	School	590.00
Billings	Newman Elementary School	School	590.00

Billings	Will James Middle School Library	School	895.00
Billings	Lewis and Clark Middle School	School	895.00
Billings	Billings Career Education Center	School	292.00
Billings	Highland Elementary School	School	590.00
Billings	Big Sky Elementary School	School	590.00
Billings	Miles Avenue Elementary School	School	590.00
Billings	Boulder Elementary School	School	590.00
Billings	Central Heights Elementary School	School	590.00
Billings	Billings Senior High School	School	1,551.00
Billings	Sandstone Elementary School	School	590.00
Billings	Eagle Cliffs Elementary School	School	895.00
Billings	Skyview High School Library	School	1,551.00
Billings	Beartooth Elementary School	School	590.00
Billings	Alkali Creek Elementary School	School	590.00
Billings	Castle Rock Middle School	School	895.00
Billings	Washington Elementary School Library	School	590.00
Billings	Arrowhead Elementary School	School	590.00
Billings	Bench Elementary School	School	590.00
Billings	Meadowlark Elementary School	School	590.00
Billings	Bitterroot Elementary School	School	590.00
Billings	McKinley Elementary School	School	590.00
Billings	Billings West High School	School	1,880.00
Billings	Paul M. Adams Memorial Library	Academic	3,100.00
Billings	Crowley Fleck Library	Special	590.00
Billings	Parmly Billings Library Bookmobile	Bookmobile	0.00
Boulder	Boulder Community Library	Public	1,551.00
Box Elder	Stone Child College Library	Academic	895.00
Box Elder	Box Elder Public Schools	School	590.00
Bozeman	Montana Bible College Library	Academic	292.00
Bozeman	Bozeman Public Library	Public	13,285.00
Bozeman	Montana State University Libraries	Academic	57,245.00
Bridger	Bridger Elem Library/ Bridger HS Library	School	292.00
Bridger	Bridger Public Library	Public	292.00
Broadus	Henry A Malley Memorial Library	Public	590.00
Browning	Browning High School Library	School	1,211.00
Browning	Browning Branch Library	Branch	0.00
Butte	Butte-Silver Bow Public Library	Public	1,880.00
Butte	Montana Tech Library	Academic	6,173.00
Cascade	Wedsworth Memorial Library	Public	292.00
Charlo	Charlo Public Schools	School	590.00
Chester	Liberty County Library	Public	590.00
Chinook	Blaine County Library	Public	590.00
Choteau	Choteau/Teton Public Library	Public	590.00
Circle	George McCone Memorial County Library	Public	590.00
Clancy	Clancy Elementary School	School	590.00

Clancy	Montana City School	School	590.00
Clancy	Clancy Community Library	Branch	0.00
Clinton	Clinton Elementary School	School	292.00
Colstrip	Colstrip High School	School	292.00
Colstrip	Bicentennial Library of Colstrip	Branch	0.00
Columbia Falls	Columbia Falls Branch Library	Branch	0.00
Columbus	Columbus Public Schools	School	895.00
Columbus	Stillwater County Library	Public	590.00
Condon	Swan Valley Community Library	Branch	0.00
Conrad	Conrad Public Library	Public	895.00
Culbertson	Culbertson Public School	School	292.00
Culbertson	Culbertson Public Library	Branch	0.00
Cut Bank	Glacier County Library	Public	1,211.00
Darby	Darby Community Public Library	Public	590.00
Deer Lodge	Cottonwood Union Library	Institutional	590.00
Deer Lodge	William K. Kohrs Memorial Library	Public	895.00
Deer Lodge	Powell County High School Library	School	590.00
Dillon	Dillon Middle School	School	292.00
Dillon	Carson Library	Academic	4,094.00
Dillon	Dillon Public Library	Public	895.00
Dodson	Dodson Branch Library	Branch	0.00
Drummond	Drummond School Community Library	Public	292.00
Dutton	Dutton Public Library	Public	292.00
East Glacier	East Glacier Park Branch Library	Branch	0.00
East Helena	Robert H. Radley School	School	590.00
East Helena	Lewis and Clark Library East Valley Branch	Branch	0.00
Ekalaka	Ekalaka Public Library	Public	292.00
Ennis	Madison Valley Public Library	Public	895.00
Eureka	Lincoln County High School	School	590.00
Eureka	Eureka Branch Library	Branch	0.00
Fairfield	Fairfield/Teton Public Library	Public	292.00
Fairfield	Fairfield Public Schools	School	590.00
Forsyth	Rosebud County Library	Public	1,880.00
Fort Benton	Chouteau County Library	Public	1,551.00
Frenchtown	Frenchtown School & Community Library	Branch	0.00
Froid	Froid School Library	School	292.00
Froid	Froid Branch Library	Branch	0.00
Geraldine	Geraldine Branch Library	Branch	0.00
Geyser	Geyser Public School	School	292.00
Glasgow	Glasgow City-County Library	Public	1,211.00
Glendive	Glendive Public Library	Public	1,551.00
Glendive	Dawson County High School Media Center	School	590.00
Glendive	Jane Carey Memorial Library	Academic	895.00

Grass Range	Grass Range School Library	School	292.00
Great Falls	University of Great Falls Library	Academic	7,661.00
Great Falls	Weaver Library	Academic	1,880.00
Great Falls	William P. Sherman Library and Archives	Special	292.00
Great Falls	Great Falls Public Library	Public	11,232.00
Great Falls	Great Falls Public Schools Information Services	School	292.00
Great Falls	Great Falls Public Library Bookmobile	Bookmobile	0.00
Hamilton	Rocky Mountain Laboratories Library	Special	590.00
Hamilton	Bitterroot Public Library	Public	1,880.00
Hardin	Big Horn County Public Library	Public	3,659.00
Harlem	Harlem Public Library	Public	590.00
Harlem	Fort Belknap College Library	Academic	292.00
Harlowton	Harlowton Public Library	Public	590.00
Havre	Havre Middle School	School	590.00
Havre	Havre High School	School	895.00
Havre	Havre-Hill County Library	Public	1,551.00
Havre	Highland Park Early Primary Schools	School	590.00
Havre	Lincoln-McKinley Primary School	School	590.00
Havre	Sunnyside Intermediate School Library	School	590.00
Havre	Vande Bogart Library	Academic	5,677.00
Helena	Montana Legislative Reference Center	Special	1,880.00
Helena	Helena High School Library	School	1,551.00
Helena	St Paul's United Methodist Church	Special	292.00
Helena	Montana Public Service Commission Library	Special	292.00
Helena	Jack and Sallie Corette Library	Academic	5,740.00
Helena	Montana State Genealogical Society Library	Special	292.00
Helena	Montana Office of Public Instruction Resource Center	Special	590.00
Helena	Helena School District #1 - IMC	School	292.00
Helena	State Law Library of Montana	Special	3,497.00
Helena	Montana Department of Transportation Library	Special	590.00
Helena	Montana Historical Society Research Center	Special	925.00
Helena	Lewis and Clark Library	Public	28,667.00
Helena	UM - Helena College of Technology Library	Academic	1,211.00
Helena	Montana State Library	Special	4,775.00
Hobson	Hobson Community Library	Branch	0.00
Joliet	Joliet Public Library	Public	292.00
Jordan	Jordan Public Schools	School	292.00
Jordan	Garfield County Library	Public	292.00
Kalispell	Glacier High School Library	School	1,211.00
Kalispell	Flathead Valley Community College	Academic	1,880.00

	Library		
Kalispell	Smith Valley School District #89 Library	School	292.00
Kalispell	Flathead County Library System	Public	22,013.00
Kalispell	Flathead High School	School	1,211.00
Lame Deer	Dr. John Woodenlegs Memorial Library	Academic	292.00
Laurel	Laurel Public Library	Public	895.00
Lewistown	Lewistown Public Library	Public	1,551.00
Libby	Libby Middle School Library	School	590.00
Libby	Lincoln County Public Libraries	Public	1,880.00
Libby	Libby High School Library	School	590.00
Lima	Lima School District #12	School	292.00
Lincoln	Lewis and Clark Library Lincoln Branch	Branch	0.00
Livingston	Park High School Library	School	895.00
Livingston	Livingston-Park County Public Library	Public	1,880.00
Malta	Phillips County Library	Public	895.00
Manhattan	Manhattan Community Library	Public	895.00
Marion	Montana Academy	School	292.00
Marion	Marion Branch Library	Branch	0.00
Melstone	Melstone School Library	School	292.00
Miles City	Miles City Public Library	Public	1,880.00
Miles City	Judson H. Flower Jr. Library	Academic	895.00
Missoula	Hellgate Middle School 6-8	School	590.00
Missoula	Center for Health Information at St. Patrick Hospital	Special	590.00
Missoula	Missoula County Public Schools	School	292.00
Missoula	Maureen and Mike Mansfield Library	Academic	88,753.00
Missoula	Hellgate Elementary School K-2	School	590.00
Missoula	Hellgate Intermediate School 3-5	School	590.00
Missoula	Missoula International School	School	292.00
Missoula	Missoula Public Library	Public	25,316.00
Missoula	William J. Jameson Law Library	Academic	590.00
Molt	Molt Elementary School	School	292.00
Opheim	Opheim Community Library	Branch	0.00
Pablo	D'Arcy McNickle Library	Academic	1,880.00
Park City	Park City School Library	School	590.00
Phillipsburg	Phillipsburg Public Library	Public	292.00
Plains	Plains School Library K-12	School	590.00
Plains	Plains Public Library District	Public	590.00
Plentywood	Sheridan County Library	Public	895.00
Polson	Polson City Library	Public	1,880.00
Poplar	Fort Peck Tribal Library	Academic	895.00
Poplar	Poplar City Library	Branch	0.00
Power	Power Public School Library	School	292.00
Pryor	St Charles School Library	School	292.00
Rapelje	Rapelje Public Schools	School	292.00
Red Lodge	Red Lodge High School	School	292.00

Red Lodge	Red Lodge Carnegie Library	Public	590.00
Richey	Richey Public Library	Branch	0.00
Ronan	Ronan City Library	Public	895.00
Ronan	Ronan High School	School	1,880.00
Roundup	Roundup Central Elementary School	School	590.00
Roundup	Roundup School-Community Library	Public	590.00
Roy	Roy Public Schools	School	292.00
Rudyard	North Star High School	School	292.00
Saco	Saco Branch Library	Branch	0.00
Saint Ignatius	St Ignatius School-Community Library	Public	590.00
Saint Regis	St Regis School & Community Library	Branch	0.00
Sand Coulee	Centerville School Library	School	590.00
Scobey	Daniels County Library	Public	590.00
Seeley Lake	Seeley Lake Branch Library	Branch	0.00
Shelby	Toole County Library	Public	895.00
Sheridan	Sheridan Public Library	Public	590.00
Sidney	Sidney High School Library	School	590.00
Sidney	Sidney-Richland County Library	Public	1,551.00
Stanford	Judith Basin County Free Library	Public	590.00
Stevensville	North Valley Public Library	Public	895.00
Stevensville	Lone Rock Elementary School	School	590.00
Sunburst	North Toole County Library	Branch	0.00
Superior	Mineral County Public Library	Public	590.00
Terry	Prairie County Library	Public	292.00
Thompson Falls	Thompson Falls High School	School	292.00
Thompson Falls	Thompson Falls Junior High School Library	School	292.00
Thompson Falls	Thompson Falls Elementary School Library	School	292.00
Thompson Falls	Thompson Falls Public Library	Public	895.00
Three Forks	Three Forks Community Library	Public	590.00
Townsend	Broadwater School and Community Library	Public	895.00
Troy	Troy K-12 Library	School	590.00
Troy	Troy Branch Library	Branch	0.00
Twin Bridges	Twin Bridges Public Library	Public	590.00
Valier	Valier Public Library	Public	590.00
Virginia City	Thompson-Hickman County Library	Public	590.00
Warm Springs	Patients' Library	Institutional	590.00
West Yellowstone	West Yellowstone Public Schools Library	School	292.00
West Yellowstone	West Yellowstone Public Library	Public	895.00

White Sulphur Springs	Meagher County/City Library	Public	590.00
White Sulphur Springs	White Sulphur Springs Public Schools Library	School	292.00
Whitefish	Whitefish Branch Library	Branch	0.00
Whitehall	Whitehall K-8 Library	School	590.00
Whitehall	Whitehall High School Library	School	292.00
Whitehall	Whitehall Community Library	Branch	0.00
Wibaux	Wibaux Public Library	Public	590.00
Winnett	Petroleum County School-Community Library	Public	292.00
Wolf Point	Roosevelt County Library	Public	1,880.00

Bold = full cataloging library