

3. Minnesota Office of Higher Education Report.

1. We have had verbal approval of the revised MINITEX Criteria for Participation and are expecting a letter.
2. I visited with the Northeast Higher Education District two-year college librarians plus the Connie Mollner from Lake Superior on November 16, 2007. I'll report during the meeting.
3. MnLINK – we will have a discussion about MnLINK during this agenda item. Expect a brief background paper sent electronically.

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**November 29, 2007**

**Re: Status of the MnLINK Program & Position**

**From Bill DeJohn:**

I've had difficulty developing a position description for a MnLINK Director because I am uncertain what the MnLINK Mission means in 2007 going forward. Rather than fill a position, I think it would be more prudent to step back and re-examine the MnLINK Mission in light of the developments over the last three years and have a discussion about what MnLINK really is. What do we really mean by "MnLINK" related to information infrastructure and information technology and our Minnesota library community? Let me stress that we have funds for a position --- the issue is how to make the best use of that position for the Minnesota library community as well as how it would fit into the MINITEX Office.

In a recent discussion with Emily Kissane, we decided it would be useful to have this discussion with the MINITEX Policy Advisory Council members and the MnLINK Gateway Operations Committee.

**In recent discussions with a few people who were involved with the original MnLINK Mission development, I proposed that we consider hiring a consultant (or someone) to take an inventory of the current state of information technological infrastructure in Minnesota and how it may relate to libraries in the next 1-5 years and make some recommendations to the Advisory Council.** This was met with agreement.

MINITEX has always been about "collaboration and shared access to library and information resources". My feeling is that in the realm of technology infrastructure as it relates to library development, we should be taking the following into account as we plan for the future. (this is not an exhaustive list):

- Future of the MnLINK Gateway software
- Internet 2 and its impact on schools and public libraries and academic and state government libraries
- Use of Internet for increased connections among Minnesotans
- The telecommunication infrastructure now tying the various pieces of the library community together
- Broadband development and the impact on library services and programming
- MN Office of Enterprise plans for infrastructure development in Minnesota and how that affects libraries

- Learning Network and how that will interface with local public and school libraries in the future.

Schools are not involved in any formal way at this point unless they are part of an existing integrated library system (there are three). I really think we need to deal with this issue in the future

What follows is some background information that might be useful to review for the discussion.

### **A. From “Update on Changes in MnLINK” a message from Minnesota Higher Education Services Office -- July 2004**

From its inception MnLINK had two purposes:

(1) moving the libraries of University of Minnesota, Minnesota State Colleges and Universities System, Minnesota State Government, and other interested public and academic institutions to a common integrated library system; and,

(2) Establishing a Gateway whereby the MnLINK ILS system and many other integrated library systems could be interconnected and searched simultaneously by Minnesota residents.

The consensus emerging from the discussions about the future of MnLINK was that after the full implementation of the Ex Libris Aleph ILS system, **the primary focus of MnLINK leaderships should be on Gateway related functions which could also encompass how to maximize the value of server site inter-connectivity.**

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### **B. MnLINK mission**

**MnLINK supports and develops a technology infrastructure and collaboration to facilitate equitable and shared access to library and information resources for all people of Minnesota.**  
(from minutes of the MnLINK Policy Advisory Council 9/23/04, p. 5)

The above statement came from two elements in the Library Planning Task Force vision

- *Minnesota library services that embrace creative collaboration between public and private entities enabling users access to seamless information resources:*
- *Minnesota library services that are visionary in their use of technology to create an adaptable and expandable library network conforming to national and international information standards.*

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### **C. MnLINK – ILS Status**

Both the University of Minnesota and MnPALS are responsible for funding their Aleph systems.

The University of Minnesota has implemented Aleph and has subsequently added several of the Ex Libris products including SFX ( which is being used by almost a dozen non University of Minnesota libraries including MnPALS libraries and private college libraries), MetaLib, Verde, and PRIMO. The

University Libraries was a development partner for PRIMO with Ex Libris and it has just been released for users on the University Libraries webpage.

MnPALS has been implementing Aleph over the last 1-2 years and remains a version behind the University. The University is now on version 18 and will move to version 19 in 2008. MnPALS is on version 17 and is planning to move to version 18 in early 2008. MnPALS does not have a final maintenance contract with Ex Libris and had a meeting last month with Ex Libris leadership to discuss this situation.

#### **D. Background Information on how we have gone about integrating MnLINK into MINITEX**

The MnLINK Gateway activity is an integral element in the MINITEX overall resource sharing program. We receive an annual LSTA grant from the MN State Library Agency to receive and process requests from MN public libraries, school libraries, and special libraries. This includes locating and delivering material to those libraries as well as sort/delivery materials between the MN Gateway server public libraries in our contract with the State Library. This list of public libraries has not changed since OHE had the contract with the MDE for MINITEX services.

The majority of the Gateway requests are either to the MINITEX Office from these public library Gateway server sites ( over 170,000 requests in FY07) or between these public library Gateway sever sites (the majority of the Gateway traffic). It's my opinion that academic students have found the MnLINK Gateway a useful way to request material especially for distance education students. Therefore, that volume is a mixed volume in terms of types of users. For example, in FY07, there were over 40,000 lending requests sent to CLIC and the University of Minnesota Libraries via the Gateway.

When MINITEX absorbed the MnLINK program the Gateway activity was integrated into the MINITEX interlibrary loan activity within the Document Delivery unit. The sorting process (between Gateway sites) was absorbed by the MINITEX Courier Delivery Unit. It is within the delivery unit that several of our academic library courier drop sites exist, where there is a formal local last mile delivery activity going on between the academic and public libraries. These sites are located in Duluth, St. Cloud, Moorhead, Mankato, and Rochester.

We have always tried to avoid duplication of effort, so we have not set up a parallel operation in the MINITEX Office for interlibrary loan services dedicated to just the Gateway activity.

Prior to the Gateway software implementation, staff at the MN public libraries (and the MINITEX Office) would use 'place-a-hold' processes to determine if a library held a title AND if it was available, thereby placing a hold on the item. This staff-mediated method of requesting resulted in high fill rates but was very inefficient because of the time involved in checking each system. Many requests were referred to MINITEX because of lack of staff time for processing them. The Gateway replaced this process with a system that allows for patron-initiated, unmediated borrowing. The consequence was a huge increase in volume going between libraries and into the MINITEX Office.

## Where We are Today

Currently:

- A) the MnLINK Gateway specialist (Nick Banitt) reports to Becky Ringwelski, Associate Director.
- B) Michael Berkowski, MINITEX IT, continues to provide technical support for the Gateway. Scott Hreha, MINITEX Web Developer, maintains the MnLINK and ZPORTAL websites.
- C) Becky coordinates weekly conference calls with staff from OCLC PICA (now OCLC), Nick and Michael. This is where enhancements, upgrades, fixes and upcoming developments are discussed. Becky is also active in the national OCLC PICA user group community. She is currently the Vice-President, President-Elect for the 2007-2009 term.
- D) Our recent increase in funding allowed us to provide additional staffing to assist Nick Banitt in support of the Gateway Server site staff and provide him the opportunity to become a supervisor in the Document Delivery unit. Nick is also being more closely integrated into the MINITEX Document Delivery program where most of the Gateway traffic is handled.
- E) In-person and web-based training on the MnLINK Gateway ILL software is being provided by Nick Banitt and Raquel Franklin. Raquel is a Library Supervisor in Document Delivery who works closely with staff at the Gateway server sites and handles incoming requests from the Gateway.
- F) Several enhancements to the MnLINK Gateway software have been made in the last several months, many at our request. The March 2007 upgrade allowed for improved handling of AV requests. This resulted in a leveling off of requests from the Gateway server sites to the MINITEX Office during the first quarter of FY08. As expected, there has been a substantial increase in requests (especially AV) between Gateway server sites, which impacts our MINITEX Delivery System.

The resource sharing component of the MnLINK Gateway, in my opinion, is working well and Minnesotans are receiving the materials they are requesting in a timely and efficient manner.

### Conferences and User Group meetings:

MINITEX sponsored a two-day regional Ex Libris User Group meeting early in 2007 and absorbed the staff costs and the costs of the conference, which was considerable. We decided not to hold a meeting in 2008 since there didn't appear to be enough new developments to warrant the time that would be spent on such an event. We are planning the next conference in 2009 when there is more for Ex Libris to show. At these meetings, we have had staff from both the University Libraries and MnPALS sharing information on how they use the Aleph system.

MINITEX has continued to hold annual MnLINK User Group meetings and had one on November 2nd with 172 people in attendance, 38 of which are from MINITEX and the University of Minnesota and 54 from MnPALS libraries.

### **E. Report of the MINITEX/MnLINK Transition Task Force**

I'll have copies of this document available Friday for your information. The transition of MnLINK to the MINITEX program of services officially occurred July 1, 2005. One of the recommendations was the appointment of a MnLINK Technology Advisory Committee. This has not been done. The period 2005-2006 was a very busy year with Joyce finishing up the MnLINK ILS contracts and working with Ex Libris and MnPALS as well as we moved ahead with the MnLINK Gateway.

For example, we celebrated the completion of the MnLINK ILS portion of the project with a reception for legislators in the Minnesota State Law Library in Spring 2006.

Joyce and I had several discussions about the makeup of a MnLINK Technology Advisory Committee and we were not able to come to an agreement since it also involved staffing for the Committee. As many of you will recall, the \$400,000 MnLINK appropriations covered the Gateway contract for maintenance and support from the vendor, a \$154,000 distributed payment to the Gateway Server sites and one staff position for Gateway support. There were no additional funds to support a MnLINK Director or a Technology Committee without taking the \$154,000 Gateway payments. This was understood to be a serious consideration. However, we still had the issue of sustainability into the future.

In the meantime, Joyce left in Summer 2006 and we have spent FY07 dealing with the success of the MnLINK Gateway and working with the vendor to bring about needed enhancements and improvements to the Gateway software to assist Gateway server library staff and users.