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4.   MnLINK Update Report.

I'll have a more formal report for you prior to the September 8ᵗʰ meeting.

1.   The attached report (pink) is a grouping of 'stories' sent in over the MnLINK Gateway feedback form asking users to share their stories. I think you will find them quite interesting.

2.   Statistics are attached:
     a.   VDX Traffic by Institution and Group: July 2005 – 2006 indicates the 375,198 reqeusts made over the Gateway during FY06. In order to determine work load, you need to add the Borrowing column (first TOTAL) which represents the requests generated by end users and staff in a particular Gateway libraries, with the Lender column (second TOTAL) which represents the requests received and filled by the particular Gateway libraries. For instance, Anoka County Library generated 13,892 requests and 8,473 of those were filled ---- but they also received 11,584 requests to search in their library system and they filled 6,050 of those requests. Since borrowing and lending materials means the materials are checked out and checked in, you can begin seeing the amount of work involved at the staff levels.
     b.   The second report is the usual MINITEX report that shows the traffic from Minnesota public libraries with the MINITEX Office. This includes both incoming and referral requests. The Rochester Public Library and Kitchigami Regional Library will be on the VDX system for FY07 and Duluth Public Library is being added to the Gateway, probably in late September 2006.

3.   There is a motion that was generated from the Minnesota Council of Regional Public Library Systrem Administrators that called for Fretwell-Downing (now OCLC PICA) to develop a method of mediating requests based upon the date of publication and the list price of materials. We are currently discussing this with OCLC PICA and determining the specifications for this activity, which would require some programming.

4.   There is a report attached that addresses the MnLINK Server Site Distribution issues along with a list of libraries in Category I and II and their status regarding Gateway implementation. I'll address more of this report when I send you some information the first of the week regarding the Gateway Payment spreadsheet. I am still running numbers and obtaining numbers from Gateway participants.

September 6, 2006

To: MINITEX Policy Advisory Council

From: Bill DeJohn

Re: MnLINK Report, September 2006
         (Part of Agenda Item #4, MINITEX Policy Advisory Council – 9/8/06)

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.***
(During Friday's meeting, I would like some feedback from each Advisory Council member on what you believe this mission means, in your opinion).

Ex Libris
MnLINK – ILS. Aleph software accepted by University of Minnesota & MnPALS. Both higher education systems are now in maintenance mode with Ex Libris. A few interlibrary loan 'fixes' need to be completed but final payment has been authorized, though Ex Libris is still reviewing its final list of things still to be accomplished.

MnLINK User Group Meeting
We have 153 registered for the User Group meeting (see attached agenda) being held September 11, 2006 at the Northland Inn, Brooklyn Park, Minnesota. Joyce arranged for keynote speaker and Becky has arranged for the afternoon Breakout sessions.

Regional ExLibris Meeting
This meeting is scheduled for March 5-6, 2007 at Northland Inn. We'll set up a planning group later this Fall and begin that process. ExLibris staff are scheduled to attend on these dates.

MnLINK Gateway
The MnLINK Gateway continues to be used by a large number of end users. MINITEX is now receiving on Mondays over 1,000 requests from the VDX system, indicating, in my opinion, that the Get-It Button is being heavily used on the week-end. Attached is a report that shows Borrowing generated over 375,000 requests in FY06 with over 221,000 filled requests by Gateway Server Site libraries and the MINITEX staff. There are several ongoing activities that we have underway to improve the Gateway operations:

A. MINITEX staff (Becky, Bill, Michael) along with Nick (MnLINK Gateway specialist) are having weekly meetings along with weekly telephone conference with OCLC PICA (formerly Fretwell-Downing).
   ❖ Enhancements are being developed:
      i.   Format solution will ask patrons to choose the format they want when making requests and the Borrowing library will be able to separate out a request by format so they can decide to purchase or put request on 'hold' list, or let the request continue into the system.
      ii. We have made decisions to eliminate frustrating 'counts' on patrons' MnLINK "Myaccount" that were stopping users from making requests. These reduced

'returned' and 'cancelled' items, which were causing many questions daily that needed to be answered.

    iii. We are bringing up Duluth Public Library on September 21st as a Gateway server site. This is the first Polaris site we have brought up on the Gateway and we are working through some specific issues between Polaris and OCLC PICA. However, we are also working through some issues that are local practices that affect how this site will interoperate with the MnLINK Gateway.

        1. An aside: East Central Regional Library has upgraded its Horizon ILS and is having major issues with its implementation. This also affects how the new system interacts with the MnLINK Gateway and these are being worked out.

        2. The point to keep in mind is that adding new sites to the Gateway brings new issues and that affects both staffing and interoperability. Both the MnLINK Gateway Specialist and the MINITEX IT staff plus other staff are working on these issues.

    iv. We continue to answer questions on a daily basis from users about Gateway functionality. Some of these questions are more correctly answered by local libraries and we are considering changing the wording so that the question would go to user's local ILL staff.

    v. We have a resolution from Gateway Operations Committee asking OCLC PICA to develop a method to stop a request and automatically check for price and for date before transmitting it on to other libraries. This would allow libraries to purchase rather than borrow for those inexpensive and/or currently published items. We are developing specifications.

    vi. MINITEX Document Delivery staff and the MnLINK Gateway Specialist are developing training modules to be used by Gateway Server site staff and end users.

B. It is useful to remind everyone that the Gateway has several components

    ❖ Software and hardware making up gateway functionality hosted on OCLC PICA server farm in Kansas.

    ❖ **It is becoming clearer to me that we are not giving enough credit to the work of the local library that makes MnLINK Gateway successful. This translates into an increase in local costs, usually staff who are pulled from other responsibilities to assist the ILL staff in handling a greater and greater increase in interlibrary loan requests for materials. The staffing issues are both at the local library and in the MINITEX Office. Plus the MINITEX Delivery System is being stretched, but more importantly, the last mile delivery services at the local and regional level are really feeling the increase in resource sharing volume moving through the state.**

Additional Gateway Server Sites.

We continue to work down the approved list of libraries to be asked if they are ready to become Gateway Server Sites. The following list may be of interest.

Category I Order

1. Kitchigami Regional Library - **ADDED**
2. Traverse des Sioux Library System - **ADDED**
3. Pioneerland Library System - **ADDED**
4. Carleton College/College of St. Olaf – pending Illiad enhancement Fall '06
5. North Star Consortium – Not Ready
6. Rochester Public Library - **ADDED**

Category II Order
1. Rochester Public Library (If not selected as a Category I) **ADDED**
2. Duluth Public Library – **Is ready. Will go live September 21.**
3. William Mitchell College of Law
4. Luther Seminary

Staffing

❖ Currently, the MnLINK Gateway Specialist is working closely with MINITEX Document Delivery staff. When MnLINK became part of MINITEX, the intention was to integrate as much as possible those functions that both organizations were performing in order to avoid duplication of effort and take advantage of known skills.
  i. The integration effort has had the following impacts thus far:
     1. Document Delivery staff assistance in creation and provision of training materials.
     2. Increased communication on issues concerning interlibrary loan and collaboration since we are all working with the same group of libraries.

Assessment Underway

1. Other than two verbal comments, I have not received any input in response to my memo of July 25, 2006 in which I asked for comments from members of the Minnesota library community about the MnLINK program and about their expectations for its future. .
2. These are some questions I hope to share with participating MnLINK library directors in the coming weeks in order to obtain a better sense of direction as seen from the local library perspective.
   a. What do you see as the role of MnLINK in the future?
   b. What kind of staff do you believe is necessary in order for MnLINK to be successful?
   c. Given the Mission of MnLINK what do you perceive to be the role of your library in MnLINK?
      i. 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.*

September 8, 2006

To: MINITEX Policy Advisory Council

From: Bill DeJohn

Re: MnLINK Gateway Payments Proposal
        (Part of Agenda Item #4, MINITEX Policy Advisory Council – 9/8/06.

In FY05, the Gateway Operations Committee was told that there may no longer be Gateway
Payments in the future in order to use the funds for MnLINK staffing and program development.
In FY06, the Gateway payments were reduced by 30%. Also, in previous meetings of the
MnLINK Policy Advisory Council, which is now disbanded, there were discussions but no firm
decisions on whether new Gateway Server Sites would receive Gateway payments along with the
original Server Sites.

These issues were discussed at the August 3rd meeting of the Gateway Operations Committee and
Committee members felt strongly that Gateway Sever Site payments should be continued at some
levels due to the extraordinary increase in borrowing and lending volume that is occurring on a
regular basis over the MnLINK Gateway. They also agreed that additional Gateway Server Sites
should receive payments along with the original Server Sites.

Specifically, the MnLINK Gateway Operations Committee recommended that, if funding allows,
Gateway payments to Server Sites would continue in FY07 and that new Gateway Server Sites
should receive payments along with the original Gateway Server Sites. In addition, they
recommended a change in the formula which currently is:

        Base Amount + Unique Titles + Number of Volumes Owned = Gateway Payment.

The Committee recommended that this be changed to:

        Base Amount + Unique Titles + Loans Filled FY06 = Gateway Payment FY07

Due to the current staffing changes occurring with Joyce's departure and the fact that we have a
carry forward from FY06, I revised the MnLINK budget for FY07 and this will allow us to
distribute approximately $154,000 among the 24 Gateway Server Sites for FY07 compared with
$101,000 in FY06. We would then re-evaluate next August 2007 whether this type of payment
could continue in FY08 and beyond or not.

ACTION. I think it would be appropriate if the Advisory Council provided the following advice
to the Minnesota Office of Higher Education:

Move that
        (1)   the MnLINK Gateway Server Site payments be continued in FY07 and that
                additional funding should be made available at an amount to be determined
                by the Office of Higher Education in consultation with the MINITEX
                Director;
        (2)   the formula for Gateway payments should be revised to substitute Loans
                filled in the previous fiscal year for the current number of volumes owned;
                and that

(3)   additional MnLINK Gateway Server Site libraries should be included in the distribution of the payments in FY07.

A draft spreadsheet indicating how this motion would be carried out is attached. I am still checking this spreadsheet for errors that might have occurred and we are waiting for one more piece of information from a Server Site.

Background – This is an excerpt from a report discussed at the MnLINK Gateway Operations Committee on August 3, 2006.

MnLINK Server Site Distribution

The Issues
During FY06 the server site distribution was decreased a flat 30% from the previous year. This reduction was taken with the recognition that additional funding was needed to support a MnLINK staff. MINITEX also, at that time, offered to pay for the MnLINK Associate Director position from MINITEX funds. The Gateway Operations Committee determined that they would stay with the FY05 volumes and titles counts and agree to the 30% reduction for FY06. They further agreed that this distribution would be revisited in FY07 in light of keeping a strong MnLINK office into the future. It was expected at that time that no additional server site payments would be forthcoming after FY06.

A second issue that was discussed was whether future sites added to the MnLINK Gateway would receive part of the distribution as they were added. There were differing views on this issue. One view was that we did not want to encourage additional sites to join the Gateway because there was concern over staffing support, stability of the hardware, and patron reaction to an increasingly long list of libraries on the search screen. Another view was that the MnLINK Gateway Operations Committee was not interested in developing a "haves and have nots" distribution where some participants received funds and others did not. With the understanding that it was unlikely that there were going to be payments in FY07, the Committee decided they would revisit this issue if, and when, the FY07 budget was discussed.

Issues to be considered during today's meeting:

- Are we going to continue the server site payments for FY07? If not, where is the funding going and for what purpose? If so, will it be based, again, on the FY05 numbers or should an updated solicitation be done?
- Are newly added server sites going to be recipients of the distribution payments as well as the original server sites?