



FY 2019 Year-End Reports to the Policy Advisory Council
September 6, 2019

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DIRECTOR'S REPORT

John Butler

Minitex and the institutional context in which it operates is in a period of momentous change. This year saw notable senior Minitex leadership transitions and the announcement of the future retirement of another high level leader in the overall administration of Minitex. Valerie Horton, Minitex Director since 2012, retired with accolades in July 2019. A national search for her successor, involving a state-wide committee, was launched and continues. John Butler, University of Minnesota Associate University Librarian, was appointed to serve as Interim Director until the appointment of a new director. Becky Ringwelski, long time Minitex Associate Director, retired in March 2019. A successful search for her successor resulted in the May 2019 appointment of Gerri Moeller, Minitex Associate Director for Resource Sharing and Delivery. Wendy Lougee, University Librarian and Dean of Libraries since 2002 and to whom Minitex reports, has announced her retirement, with date effective pending the appointment of her successor. These significant transitions are accompanied by major new leadership appointments at the University of Minnesota (President Joan Gabel in July 2019 and a new Provost appointment expected in the next quarter or two) and at the Minnesota Office of Higher Education (Commissioner Dennis Olson, Jr.). The infusion of new leadership inspires excitement for a future of extraordinary opportunity built on a very strong foundation and traditions of innovative services.

Through these significant and continuing changes, FY 2019 (7/1/18 – 6/30/19) was another very successful year for Minitex. Though Minitex's funding from the Office of Higher Education, its primary funding source, has remained flat since FY14 (seven years), we have created efficiencies and found cost-savings to address inflation, sustain, and even grow services. Summarizing this past year's activities across Minitex's historically core services as well as those nascent and prototypical, the Managers' Reports below provide evidence of accomplishments, outreach, and deliverables across Minitex's program, services, and support functions.

In addition, we are beginning to analyze the results of the Minitex 2019 Stakeholder Survey, which measured satisfaction with, and unawareness and non-use of 16 Minitex programs and services. As an established triennial survey, with 2019 being the third time administered, there is opportunity to monitor trends and to inform strategic planning and resource allocation. The 2019 survey yielded 722 responses and 877 comments to open-ended questions! Preliminary analysis makes clear the areas of *highest and enduring value* among our constituencies -- Resource Sharing, eLibrary for Minnesota, Physical Delivery, MNLINK, and Cooperative Purchasing of E-Resources (which was estimated to have saved Minnesota libraries \$5.9M this past year). It is equally impressive to note that *none* of the 16 programs or services registered levels of dissatisfaction exceeding 3%, and several had 0% dissatisfaction levels. Overall, these high-level results speak to strongly valued services, sustained at high levels over time. We are aiming to disseminate the findings of the survey to the community by late September/early October, and intend to immediately incorporate these data into near-and mid-range planning.

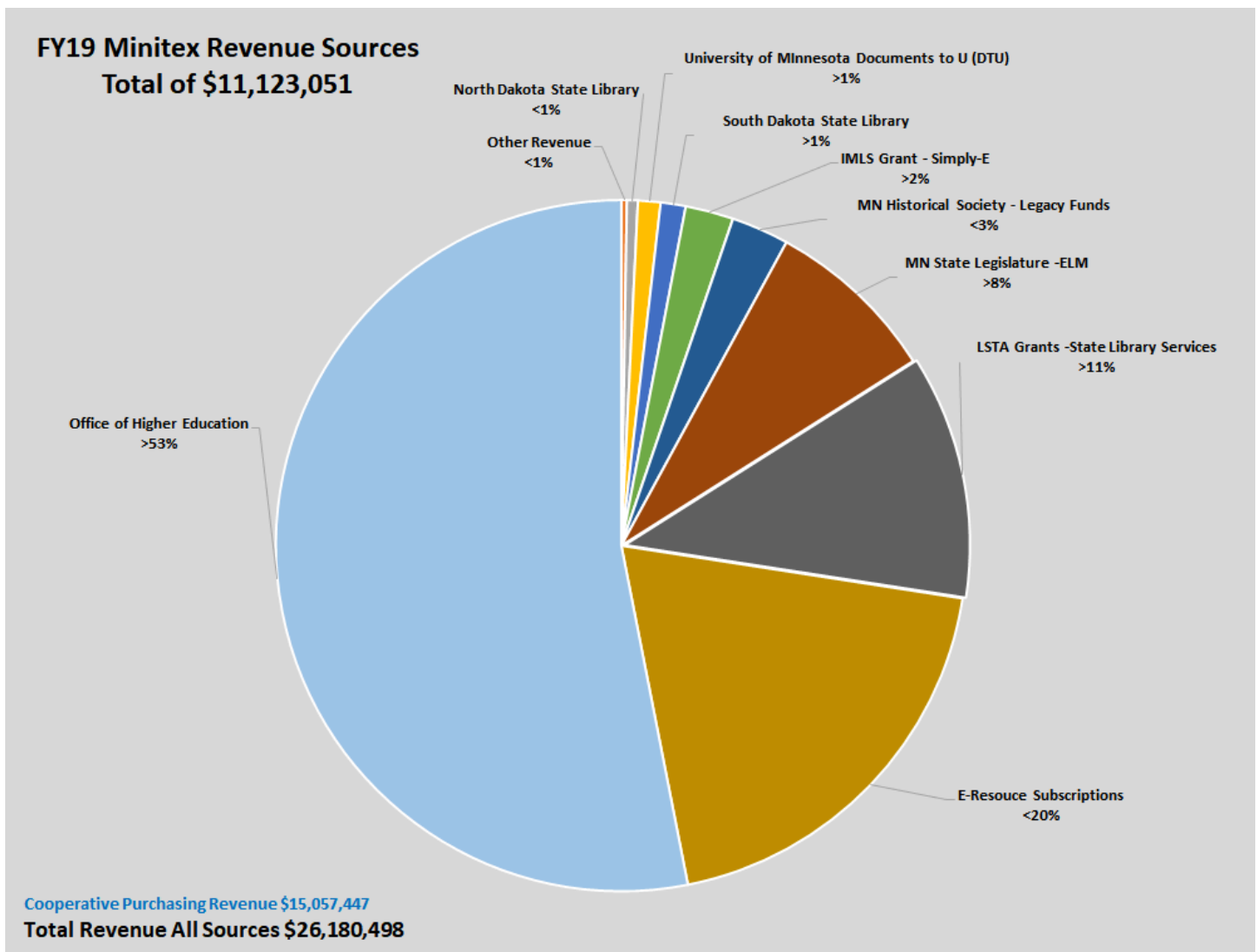
I hope this overall Minitex report will prompt discussion, questions, ideas, and thought about the impact that Minitex has made this past year and the opportunities before us to progress towards fulfilling our vision: *Flourishing libraries in informed communities.*

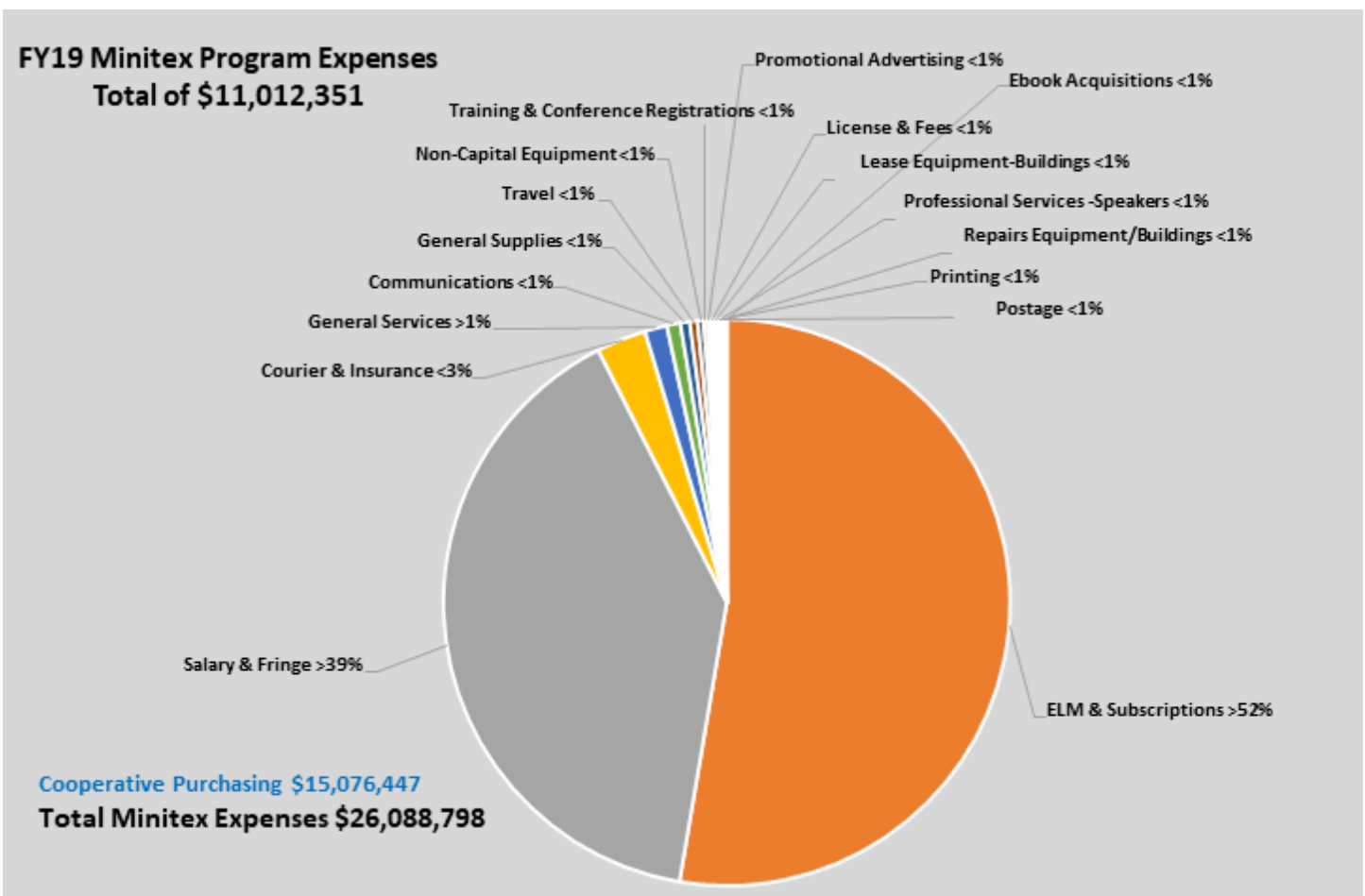
FISCAL SERVICES

Terry Beseman

Administrative Fiscal Services works closely with staff across the region to provide administrative support to affiliated libraries in regards to fiscal services as needed on a timely basis.

Fiscal Year 2019 (7/1/18 – 6/30/19) was another successful year for Minitex. Our FY19 Office of Higher Education state appropriation was \$5,905,000. Through Legacy funding, grants, and contracts, we provided services to Minnesota’s Academic, Public & K12 Libraries as well as cultural heritage organizations and state library agencies in our five state region. We also support a long-standing reciprocal resource sharing arrangement with libraries in Wisconsin. Besides the \$900,000 the State Legislature allocated for Electronic Library of Minnesota, North & South Dakota State contracts amounted to \$184,362 and Minitex received \$300,000 in Legacy funds from the Minnesota Historical Society. Minitex was allocated Federal LSTA funds from the Minnesota State Library Services amounting to \$1,280,000. We are also assisting CALD (the Council of Academic Library Directors) in administering a \$72,000 LSTA award for a shared-print retention program to preserve scholarly materials held in the respective collections. Minitex just finished year three of the Federal IMLS grant in which we were awarded \$695,000 for the Simply-E mobile phone application. The attached graphs show Minitex had total revenues of \$26,180,498 and total expenses of \$26,088,798 in FY19, a net difference of \$91,700.





RESOURCE SHARING, DELIVERY, & MNLINK

Geri Moeller

Becky Ringwelski, the long-time director of Resource Sharing and Delivery, retired in spring of 2019. She will be missed!

I started at the end of May and while my time didn't overlap with Becky, I was able to spend a lot of time with Valerie before she retired. I'm grateful I was able to learn from her before she left. I'm thrilled to be here at Minitex. My very first library job was in government documents and interlibrary loan at a small liberal arts college in Wisconsin. I have fond memories of requesting and lending documents to Minitex, as the staff were professional, quick and easy to deal with. It's lovely to have my career come full circle and to be back in resource sharing.

Resource Sharing

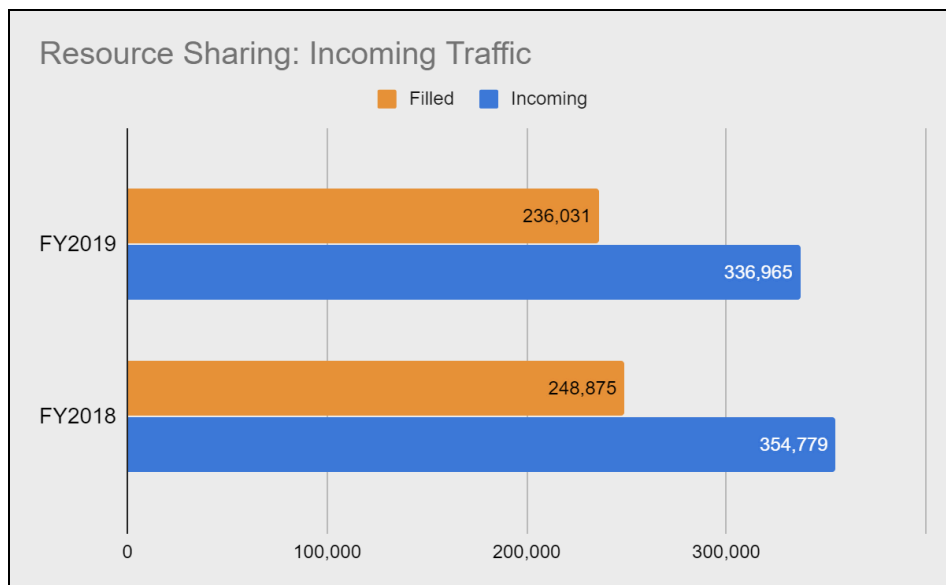
The resource sharing staff process requests from libraries in Minnesota, North Dakota, South Dakota and Wisconsin. Speed and accuracy are our key objectives when processing the high volume of requests we receive. We're always striving to find new ways to provide even better service to our library partners.

Here are the Resource Sharing highlights for FY2019:

- Received over 336,965 requests.
- Filled 236,031 of the total requests.
- We were the top lender for filled requests on the OCLC WorldShare ILL system (again)!
- Delivered 60,475 articles electronically.

- Filled over 94,983 requests from the University of Minnesota collection; 36,862 of these from electronic resources.
- Received 34,361 requests in October, 2018 - the busiest month of the year!
- Hosted the Public Library Node Meeting August 15, 2018 for 43 attendees.
- Average turnaround time for University of Minnesota fills was .6 days.
- Referral fill rates (requests that are sent on to owning libraries from Minitex staff) are at their highest rate ever - 85.9%!

In addition, Resource Sharing staff worked closely with MnPALS and University of Minnesota staff on the Alma implementation. While the migration happened in February 2019, staff are continuing to work with MnPALS and University of Minnesota staff on transition issues, including key enhancements, request management and staff training. The transition to Alma from Aleph also affected our incoming, copies, e-resources and e-delivery statistics. It's still too early to know if this pattern will continue.



We continue to pay close attention to OCLC's Tipasa ILL system, participating in conference calls, webinars and conference sessions on the topic. We expect that this will at some point replace our existing system used in the Minitex office.

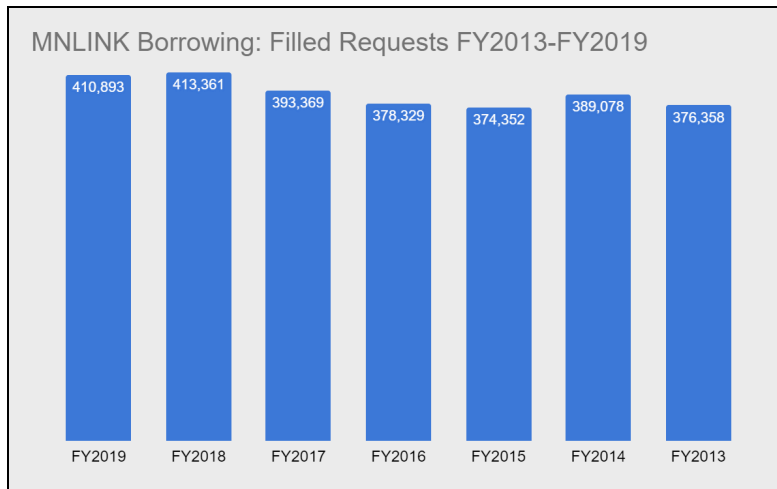
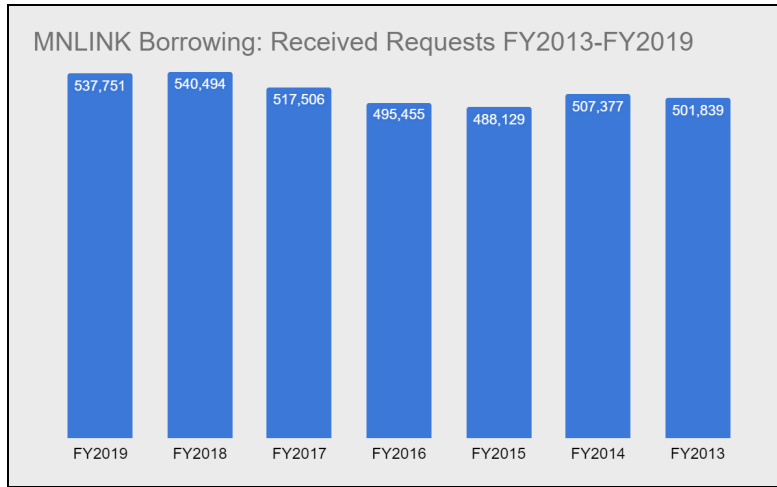
MNLINK

This year we saw a slight decrease of .5% in requests coming into the MNLINK system. This still results in FY2019 having the second highest number of requests received over the past six years. These requests are generated by library patrons in Minnesota.

While MNLINK may eventually move to Relais D2D (Discovery to Delivery) for the interlibrary loan function, the date for a migration has been significantly pushed back. During a conference call earlier this year, we were told that the end of life for VDX has been extended for five years, with a Minitex transition happening closer to the end of this period. We're continuing our discussions with OCLC about this product and the needs of the MNLINK libraries, and are in the planning stages of an OCLC visit to Minitex and MNLINK member libraries to discuss our usage of VDX. Ensuring that the product meets the needs of MNLINK libraries is central to our discussions with Relais staff.

Resource Sharing staff continue to work on sharing information relevant to resource sharing and delivery on Minitex News. Over the past year, staff have written 48 articles on topics ranging from a re-examination of CONTU guidelines to ERIC documents and troubleshooting delivery issues.

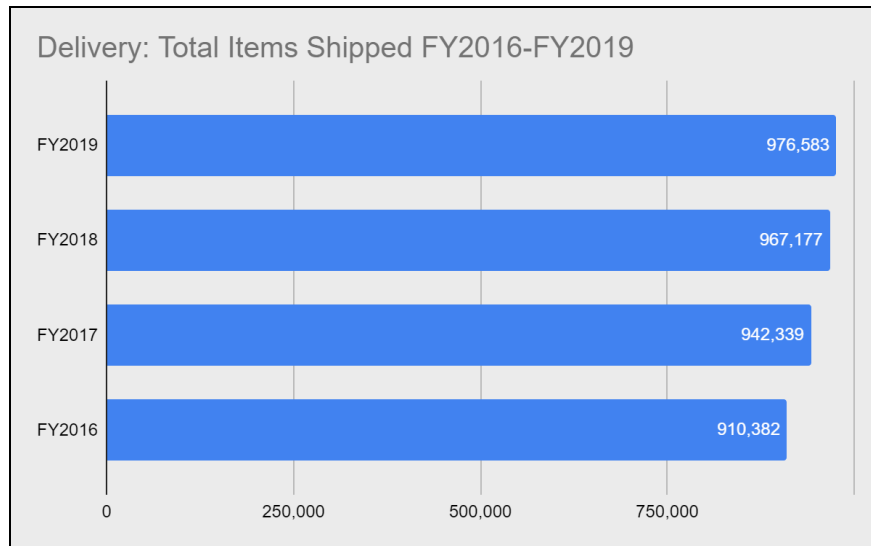
The following charts demonstrate the pattern of incoming and filled requests on the MNLINK system.



DELIVERY

The Minitex Delivery Unit provides overnight shipment to public and academic libraries in the region via contract courier and package service. These are the highlights for FY2019:

- Handled over 976,583 items for libraries in the region - an increase over last year!
- Over 51,348 delivery totes came through the Minitex Delivery unit.
- Processed and sent 10,404 UPS packages.
- Minitex delivery continues to modify staffing hours in order to meet the shifting needs of our member libraries.
- Minitex was able to successfully extend contracts with current courier partners, resulting in no increase in courier costs for FY2020 and 1-1-½ percent increases for the next few years.



REFERENCE OUTREACH AND INSTRUCTION & COOPERATIVE PURCHASING & MN LIBRARY ACCESS CENTER

Matt Lee

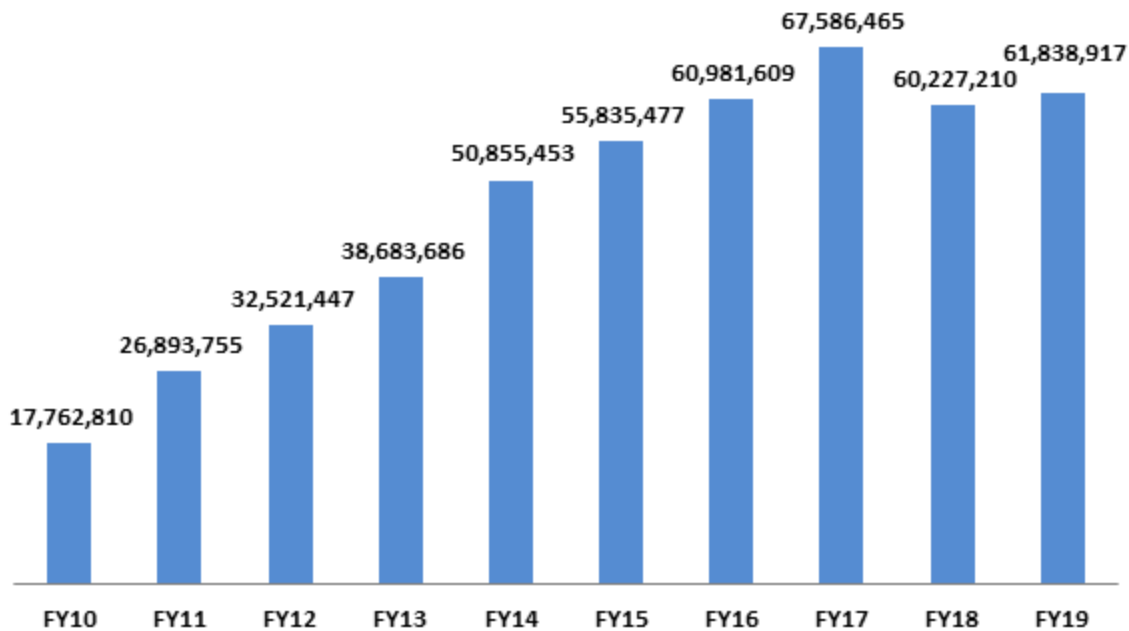
eLibrary Minnesota (ELM)

This year Minitex rebranded ELM. We changed the program name from Electronic Library for Minnesota to eLibrary Minnesota, which modernized it while allowing us to keep the ELM initials. We also updated the logo with input from the community, and redesigned the ELM website at elibrarymn.org.

ELM: Usage

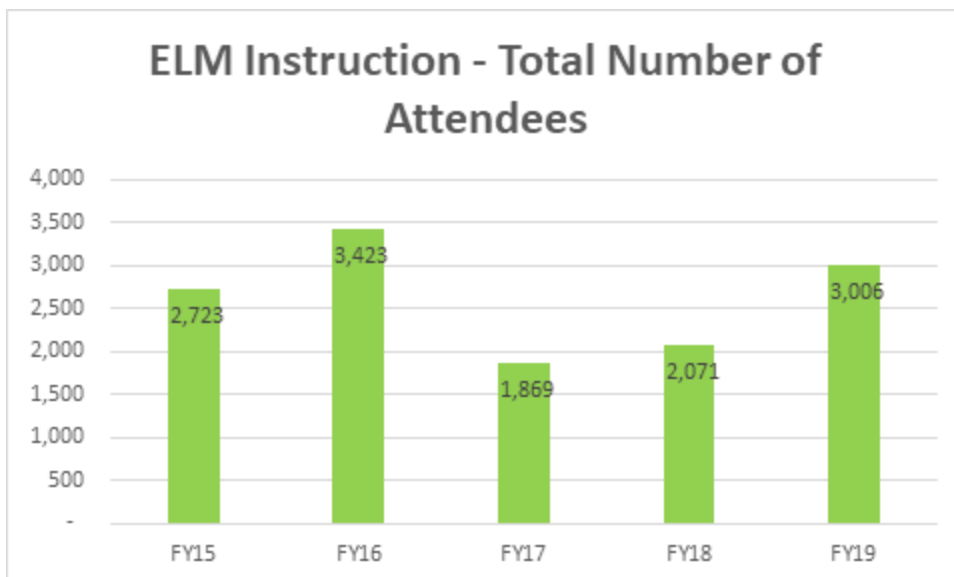
The ELM databases were searched 61,838,917 times in FY19, an increase of almost 3% from the previous fiscal year.

ELM Usage - Total Searches



ELM: Instruction and Outreach

Minitex Outreach and Instruction Librarians reached 3,006 people with ELM instruction.



ELM: Content RFP

In late FY19, we began the year-long process to assess the current statewide database collection and to seek and evaluate vendor proposals to sign new ELM contracts. The process will continue throughout the year. New contracts need to be in place on July 1, 2020. North Dakota and South Dakota are partnering in the process again this cycle.

Ebooks Minnesota: Program and Content

The Ebooks Minnesota program has been moved under the ELM banner for internal management. A cross-unit internal team has been charged and has identified a number of project areas to pursue in the year ahead.

Ebooks Minnesota: Usage

Minnesotans opened 85,344 titles via Ebooks Minnesota in FY19. The decrease in usage from FY18 falls largely within the Ebooks MN for Schools version. That version was launched in FY18 to heavy usage, but usage decreased in FY19 despite continued promotion.



AskMN: Platform

In May of 2019, OCLC sold the QuestionPoint software and 24x7 chat reference support network to Springshare. Over the next year, Minitex will work with Springshare to transfer all of our AskMN accounts and service over to the LibAnswers platform. Product training will be an important component of the transition.

AskMN: Usage

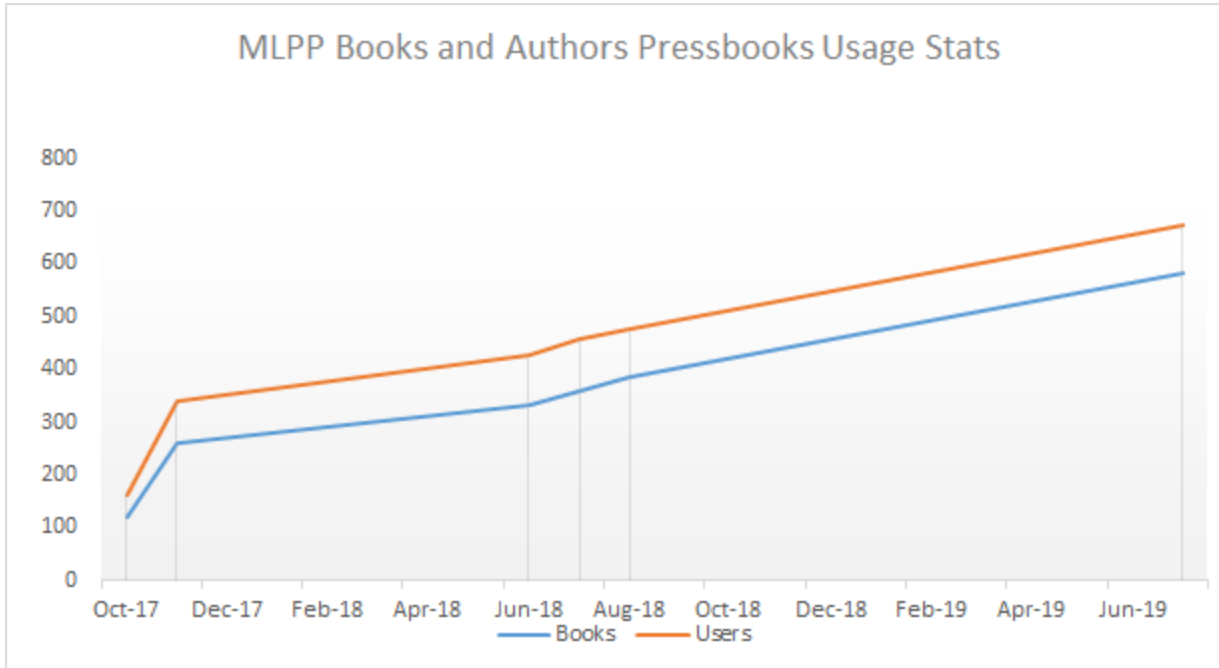
Minitex Reference Outreach & Instruction administered, managed, and helped staff AskMN, Minnesota's statewide virtual reference service.

- 34,854 questions were answered.
- 14,743 questions were answered by the Academic library queue, a 20% increase from the prior year.
- 20,111 questions were answered by the Public library queue, a 12% decrease from the prior year.

The decrease in the Public queue was triggered by the end of an experiment to have chat widgets pop up proactively within ELM's K12 databases. While that proactive chat increased volume to the Public queue, it did not often garner earnest questions from K12 students, and was discontinued.

Minnesota Libraries Publishing Project (MLPP): Usage

As of July 2019, there were 584 titles that have been created on the MLPP Pressbooks platform since its launch in 2017.



Cooperative Purchasing: Cost Avoidance

Minnesota libraries saved an estimated \$5.9 million on e-resources and library products in FY19 by working with CPERS.

Cooperative Purchasing: Orders

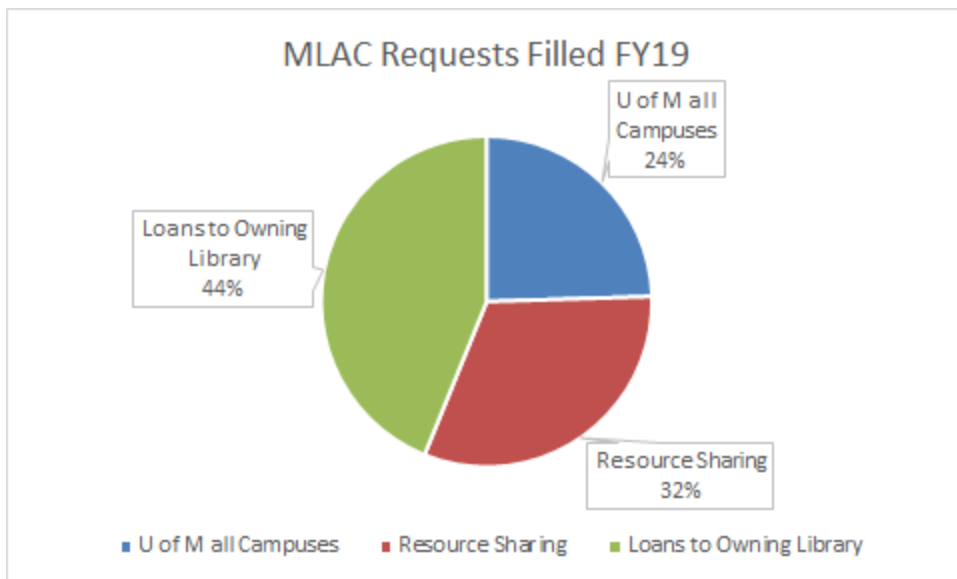
Our E-Resources Librarians and Products Specialist managed 2,684 orders for databases and library products in FY19.

Cooperative Purchasing: Libraries

Over its history, the CPERS unit has helped 798 Minnesota libraries save time and money on the purchase and licensing of databases and library products, and a total of 2,342 institutions nationwide.

MN Library Access Center (MLAC): Filled Requests

MLAC staff filled 14,523 requests in FY19, which is almost exactly as many as they filled in FY18.



MLAC: Collection Management

MLAC staff worked with the University of Minnesota Twin Cities and the University of Minnesota Duluth to de-duplicate portions of the collection. 33,735 items were de-duplicated. Following which, over 61,000 items were relocated to consolidate shelf space.

MLAC: Item Repair and Preservation

MLAC staff repaired 845 items from UMN-Twin Cities holdings in one fashion or another, from re-backing to spine repair to leather treatment.

DIGITAL INITIATIVES & METADATA EDUCATION

Jolie Graybill

The Digital Initiatives and Metadata Education unit (DIME) training and education numbers and outreach saw a very slight increase in total numbers reached, and continued to serve the Minitex core region of Minnesota, North Dakota, and South Dakota. In addition, OCLC contract training facilitated by two DIME unit staff reached 39 US states, Canada, and four foreign countries. The trainings consisted of in-person workshops or conferences (60) and virtual webinars (33), and reached 2,093 individuals.

The Minnesota Digital Library staff, Operations group, and Governance Committee completed analysis of the strategic planning efforts started last summer, culminating in identifying Values, Goals, and Objectives. The MDL Values include Access, Inclusion, Openness, Sustainability, and Collaboration; MDL Goals & Objectives include:

- Goal #1 – Find, collect, and preserve rich content
- Goal #2 – Share content and engage users
- Goal #3 – Foster diversity, equity, and inclusion
- Goal #4 – Ensure adequate, growing resources to meet MDL mission

The formal MDL Strategic Plan and Values will be made available via the Minnesota Digital Library website this fall.

In addition to the strategic planning work, the MDL Annual Conference was held in the Twin Cities area this spring at a new location, the Earle Brown Conference Center in Brooklyn Center, MN. The new location was

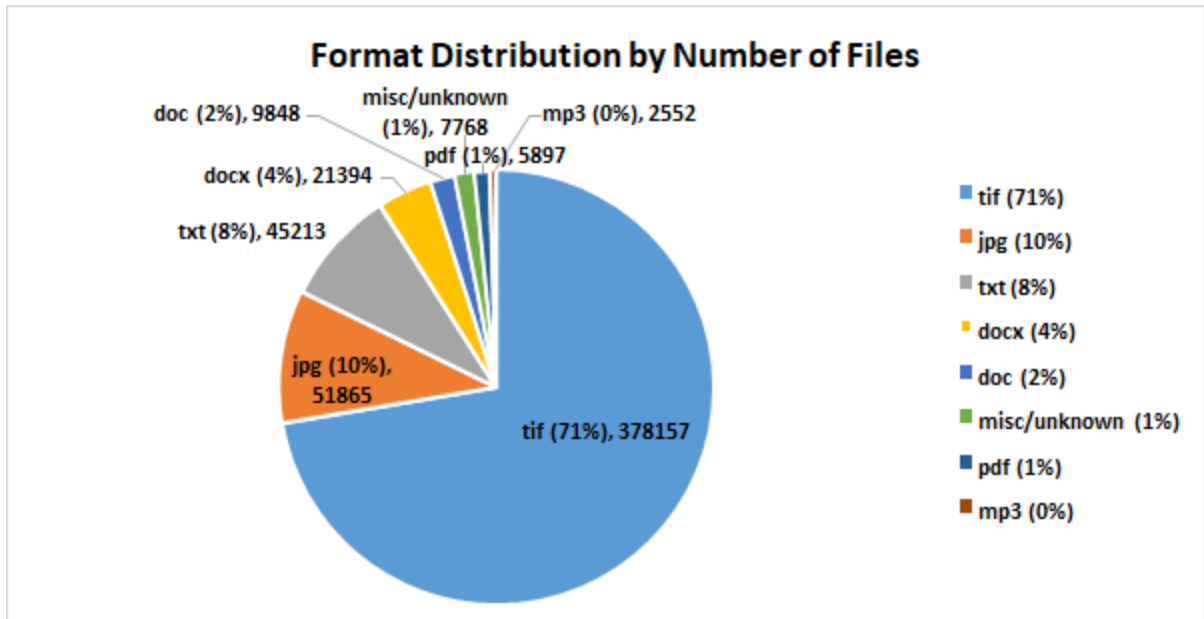
extremely well-received and enjoyed by participants attending from around the region. Keynotes for this year's conference were John Bracken from DPLA and Keven Taggart from OCLC.

Other MDL efforts included:

- The MDL Rights Work moved from pilot stage to implementation stage this summer with ten trainings, including one in the metro area and one in Duluth. As a result of these efforts, 4 contributing organizations in the pilot group completed rights statements on a total of 3,344 items. In a second offering of Rights Statements training sessions, an additional 12 contributing organizations determined statements on 7,125 items. Currently, Minnesota Reflections contains items from 192 different contributing organizations in 84 counties, and each one needs to do the Rights Statements identification/implementation. MDL will be conducting trainings and work sessions over the next several years to assist with the Rights work. Immediate plans include identifying training sessions for the outlying metro area to attract both Twin Cities contributors and contributing organizations from the surrounding areas.
- Phase 16 opened for Minnesota Reflections. Since Phase 15, new contributors are required to comply with the Rights Statements implementation project by designating respective statements to items. Minnesota Reflections highlights for this year include:
 - Users launched 165,644 sessions (a 173% increase over the previous year) and viewed over 346,928 digital objects (a 94% increase over the previous year)
 - Most used collections: University of Minnesota Duluth, Kathryn A. Martin Library, NEMHC Collections, Hennepin County Library, Minnesota Streetcar Museum, Nicollet County Historical Society, and the Iron Range Research Center.
 - Added 272 photos, 11 compound documents (688 pages), and 82 audio or visual documents this last year
 - The #1 Item of the Week posting this year with 6,628 views was the Coming Attractions at Lakeside Ballroom Poster, from Glenwood, Minnesota and the Pope County Historical Society. <https://reflections.mndigital.org/catalog/pch:88#/image/0>



- Current MDL file holdings include 533,330 unique files using 21.6 terabytes, see format breakdown:



- See the Minnesota Digital website at <https://mndigital.org/>, and the Minnesota Reflections website at <https://reflections.mndigital.org/>.

An upcoming event this fall, the 2019 Technical Services Symposium has DIME staff working with the 2019 Planning Committee developing the November 14, 2019 symposium with a theme of Diversity, Equity, and Inclusion in Technical Services featuring Keynote speaker Amber Billey from Bard college, and a special documentary film, “Change the Subject” with Tina Gross hosting the plenary session. The symposium will be held at the Brookdale Library in Brooklyn Center, Minnesota with registration opening mid-September.

COMMUNICATIONS & ORGANIZATIONAL SUPPORT (C+OS)

Zach Miller

Minitex News

FY2019 was a big news year for Minitex, and readership of our principal communications channel, Minitex News, grew accordingly. Specifically, our number of unique readers, 20,725, was 20.8% higher than the year before, and marked an all-time high. The goal of Minitex News is to reach the entire Minnesota library community with helpful news and announcements about Minitex programs and services.

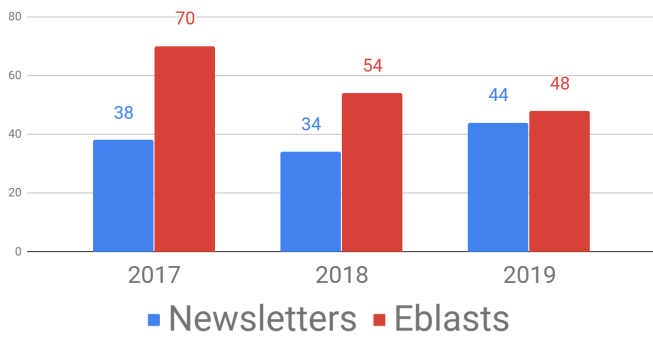
CiviCRM

CiviCRM is Minitex’s contact database, mass email distribution tool, and our most effective means of driving traffic to Minitex News. When an article is published, CiviCRM automatically emails it to subscribers. This is called an “immediate update.” Newsletters containing multiple articles are published monthly, quarterly, or not at all, at the discretion of the publishing unit. Visitors to Minitex News may subscribe by choosing their preferred delivery method (immediate updates or newsletters) and the site sections (see “Immediate Updates Subscribers” chart below) from which they would like to receive articles. The number of subscribers in each category increases each year (see below).

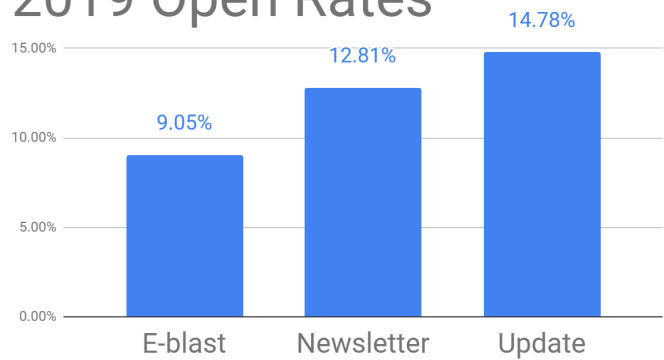
An “eblast” is an email sent to subscribers using CiviCRM that sidesteps the process of publishing content to Minitex News. A major announcement such as a solicitation to fill out the Minitex Stakeholder Survey, is an example of an eblast.

Eblasts garner the least attention from our subscribers, so we are working to send them less often and to publish articles and send newsletters more frequently.

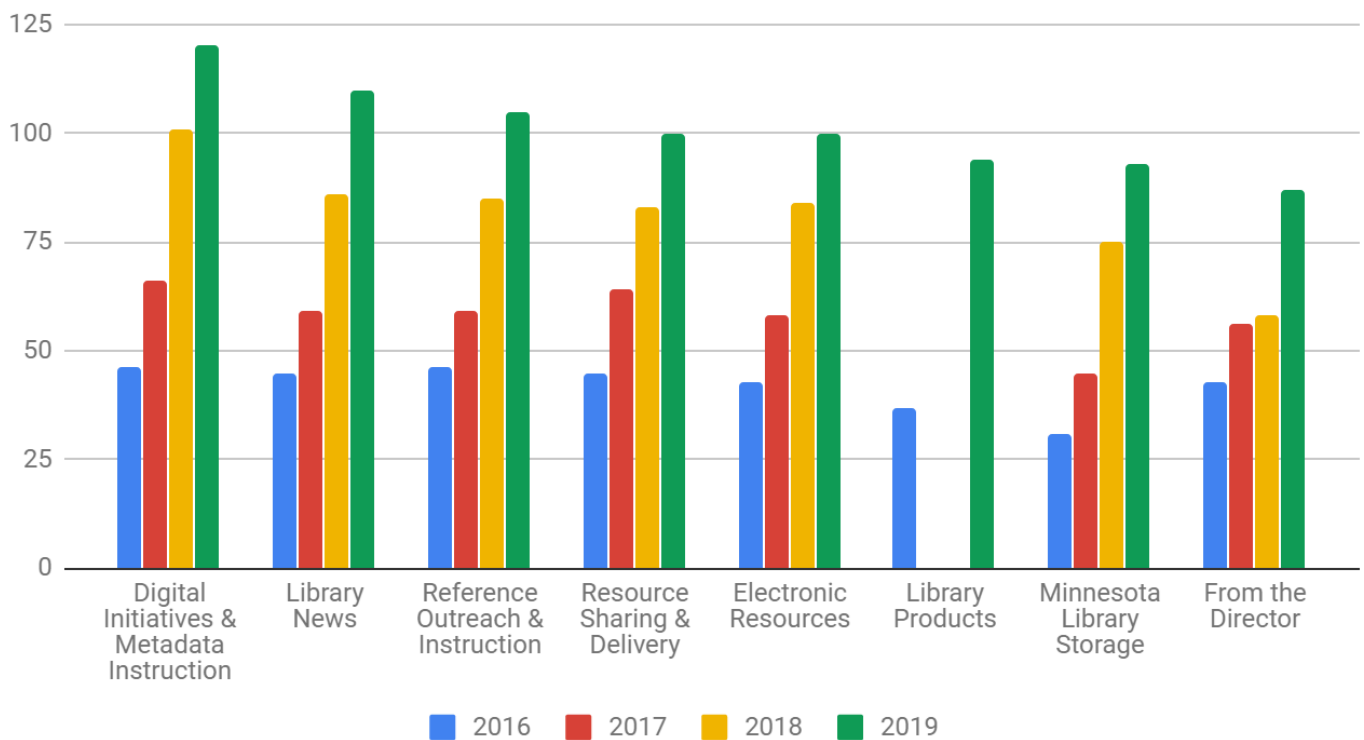
Newsletters & Eblasts Sent



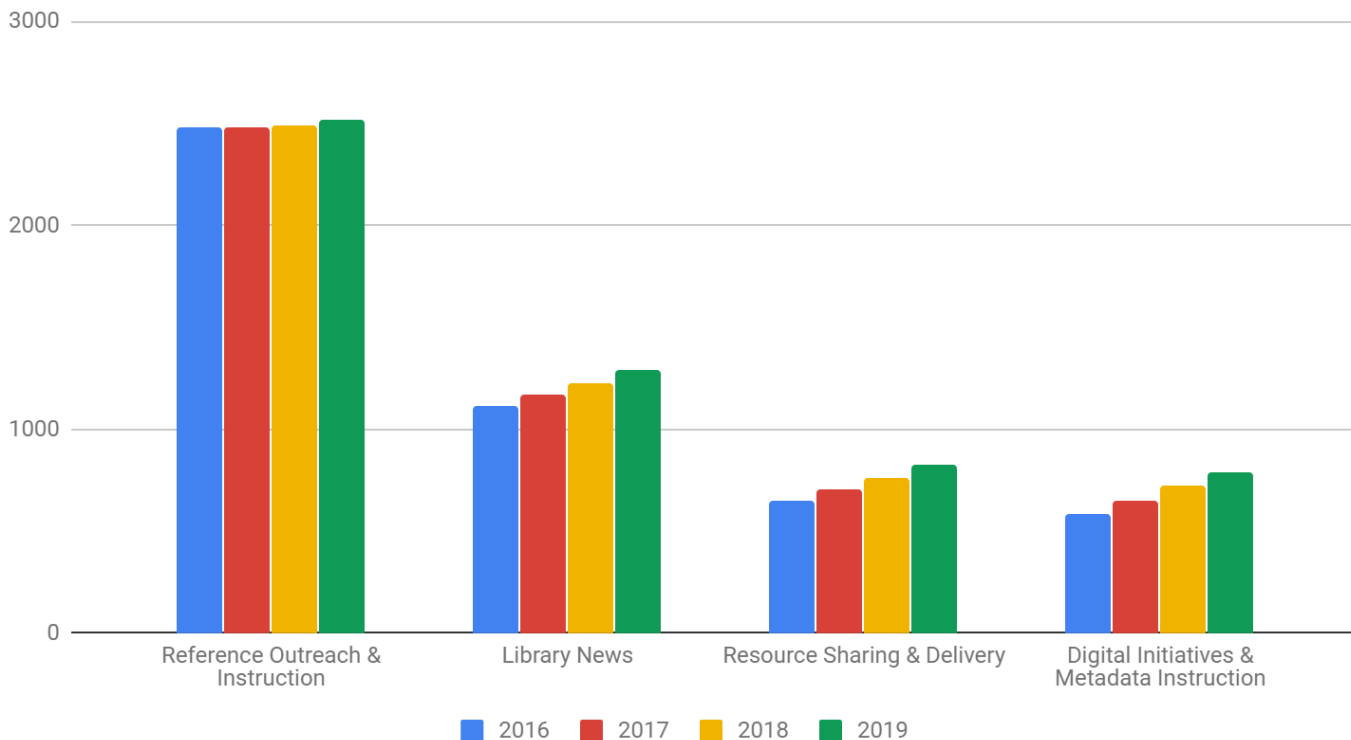
2019 Open Rates



Immediate Update Subscribers



Newsletter Subscribers



Social Media

The purpose of social media accounts at Minitex is to inform Minnesota library staff about our programs and services and to inform Minnesota library patrons about the services we offer to them. Social media is not as effective as direct email at driving traffic (and likely never will be), but it is becoming moreso. Minitex maintains accounts on both Facebook and Twitter. These platforms accounted for 7% of referrals to Minitex News over the past year.

Facebook

Facebook is more effective than Twitter at getting the word out about our products and services. Facebook accounted for over 75% of the social referrals to Minitex News over the past year. On our Ebooks Minnesota page, we recently began focusing on the promotion of location-based titles, and the results have been good. Had the campaign (which began in July) taken place in FY2019, it would have accounted for four of the year's top five posts.

08/13/2019 11:31 AM	 Moorhead, Minnesota, was founded in 1872 as a major			3.2K		523 118	
08/19/2019 5:40 PM	 View vintage postcards depicting the industries,			2.1K		113 48	
07/05/2018 8:25 AM	 Great article about Ebooks Minnesota in the			1.1K		87 35	
08/07/2019 5:31 PM	 "Zenith City: Stories from Duluth" by Michael Fedo is			687		16 5	
07/16/2019 5:49 PM	 Take a journey though the history of Alexandria, MN			579		34 46	

Twitter

Our Minitex Twitter account added 109 followers last year (versus 122 the previous year), reaching a total of 866. The account made 236,000 “Twitter impressions” in FY2019, an increase of 43% over the previous year.

The Ebooks Minnesota Twitter account is growing as well. It added 77 followers last year, the same as the previous year. The account made nearly 96,000 impressions, an increase of 85% over the previous year.

Promotional Materials

Minitex offers promotional materials to libraries that request them, at no charge. Last year, we sent out 60,784 bookmarks, brochures, calendars, postcards, posters, pens, and other items. This number marked a reduction from years past.

Google Business

Minitex’s Google Business listing provides insight into the user search behavior that leads to Minitex. Although the top search term that leads users to us is indeed “minitex,” those searches amount to just 16.8% of searches in the most recent quarter (Google does not share annual data). The bulk of searchers arrive at our listing because they are looking for a library. After “minitex,” the second, third and fourth most-used search terms that led to us were “library,” “public library,” and “library near me.”

INFORMATION TECHNOLOGY

Paul Swanson

The **eLibrary Minnesota** rebranding work mentioned earlier allowed us the opportunity to both upgrade and outsource the underlying technology for the service. The website itself was previously a custom-built application that had been in production for well over ten years. Working in coordination with ELM staff, we migrated it to a Springshare based LibGuides installation. ELM staff developed the layout and navigation for the website, and we worked on the theming and styling of it. It was a happy moment when we realized that LibGuides can do all of the website work for us! This allows ELM staff to directly manage the site and is one less website that we have to maintain and code ourselves. We also upgraded the EzProxy instance behind and made other architectural changes that has made the platform more robust and available to K-12 institutions who had sometimes black-listed all proxying platforms on their networks.

With Resource Sharing’s Mira application moved into maintenance mode last year, this freed up developer time to work on our other major custom-built software application, the **Cost Savings Database**. This desktop

application supports our cooperative purchasing work, allowing staff to more easily manage the electronic resource renewal process, manage library product sales and inventory, and power our ecommerce website, shop.minitex.umn.edu. This work will extend through this fiscal year and will modernize the application and automate the creation of transactions in our financial system, Traverse.

Last year, Minitex and the University Libraries underwent a **technology and financial audit** by the Office of Internal Audit. As I mentioned last year, being audited is a good thing and something that we welcome. It helps protect the security and integrity of our organizational data and ensures that we remain good stewards of the data the community entrusts with us. The findings were very in-line with any technology audit and called for better backups, better log management, and better user-access control. Along with these priorities, we have also been charged to implement two-factor authentication for staff access into our financial system. We have been working with University Information Security on this and hope to pilot a solution in the near term. Also over the next year, as part of improved user management, we will be reaching out to our participating libraries to help us verify that their user access and roles into our systems are accurate.

Finally, our work on **SimplyE**, the national ebook delivery platform, has continued through the year. This work is the result of our receiving a National Leadership Grant from IMLS in 2016. Our development work has resulted in several different features being merged into the system, most notably bookmarks, device notifications, and support for PDF formatted ebooks. This year, we have accelerated our deployments to testing partners with our current list including Great River Regional Library and Hennepin County Library in Minnesota; Pinnacle Library Cooperative, Schaumburg Township District Library, and Green Hills Public Library in Illinois; and Massachusetts Library System. We are currently in discussions with four additional libraries in Illinois to deploy their collections and help guide them through testing the system. We are at a tipping point now wherein we want to encourage more libraries to deploy into the system to help pressure additional content providers to build APIs for integration, and also pressure publishers to adopt DRM schemes that are more library-friendly and cost effective. To this end, we are participating on the newly created SimplyE Advisory Council to guide the development of the platform and the delivery of the service to participating libraries.