

## MISSOURI PUBLIC LIBRARY AUTOMATION TASK FORCE/STATE-WIDE RESOURCE SHARING

Acting for the Library Automation Task Force  
Jeanette Piquet, Chair  
Richmond Heights Memorial Library  
8001 Dale Avenue

Phone: 314-645-6202  
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*Library Automation Task Force Members*

Cathy Dame, Lebanon-Laclede County Library  
David Doennig, Stone County Library  
Cindy Youngblood, Polk County Library  
Karen Hayden, Little Dixie Regional Libraries

Steve Campbell, North Kansas City Public Library  
Patrick Wall, University City Public Library  
Eva Dunn, Bollinger County Library  
Carl Wingo, Missouri State Library

June 15, 2011

Dear Library Director,

This letter is a request for your statement of interest in participating in a consortium to provide affordable library automation that would make state-wide resource sharing more efficient and easy with quick access to a wider range of materials. We are asking for your interest, not a commitment.

At the Automation Summit organized by the State Library last fall, we learned a number of Missouri public libraries are interested. From that meeting a task force was formed. Since then, our task force has been meeting to research options for creating a consortium of public libraries for a shared automation system. The goal is that all participating libraries would share an online catalog. Their patrons could request items from any of the member libraries via this catalog. The items would be delivered via the currently existing KCMLIN delivery system.

In December, the task force surveyed public libraries to find out what library automation software they were using, what their satisfaction level with their current systems was, and whether they planned to migrate to new systems in the next 1-3 years. What we have learned is that a sizeable number of you are interested in migrating to new systems and participating in a consortium.

Now we are writing to ask if you would like to be part of a group request for no-obligation cost estimates from all the automation system vendors and service providers we contacted. Since most vendors base their estimates on the number of libraries, circulation data, holdings data and population served, having a pool of libraries would facilitate this process. The State Library has compiled this data and can supply it for any combination of public libraries that join our pool. If you would like to participate in this phase, please sign and return the attached Letter of Interest.

Once we have obtained these cost estimates, we will send out a second request, this time seeking a formal Letter of Intent to join in the creation of a consortium that would request formal quotes from a subset of the vendors previously contacted.

The attached FAQ describes some of the activities that the new consortium would have to carry out to implement the new system. All consortium members will be given an opportunity to review the final cost figures and confirm their commitment to the shared purchase prior to a contract being signed with the vendor.

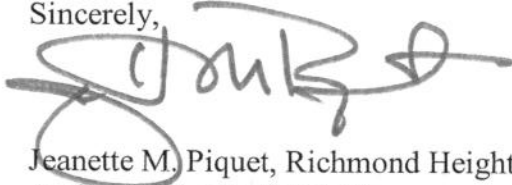
For now, we would appreciate your library's return of a Letter of Interest by July 15.

You may fax the form to 314-781-3434 or send it to:

Jeanette M. Piquet, Director  
Richmond Heights Memorial Library  
8001 Dale Avenue  
Richmond Heights, Missouri 63117-1448.

We hope this proposal is just the beginning of a multi-year process to build a new public library consortium for a shared library automation system and resource sharing. The task force members who worked on the proposal are listed in the letterhead, and we look forward to your responses.

Sincerely,

A handwritten signature in black ink, appearing to read "JPiquet", with a large, stylized flourish extending to the right.

Jeanette M. Piquet, Richmond Heights Memorial Library  
Acting for the ILS Task Force

Attachments:

1. Library Automation Consortium FAQ
2. Letter of Interest Form

## FAQ: Joining a Library Automation Consortium

Q. Would I have to stop using my current automation system?

A. Most likely, yes, depending on the automation system chosen. If you join the consortium, you will need to move patron data and MARC records from your current system to the consortium's automation system. All consortium member libraries will have their holdings in a common database, or "union catalog".

Q. Will the new vendor help me migrate my data to the new system?

A. Yes, they will provide guidance on formatting and transferring your data.

Q. How much tech support will I get in the new consortium?

A. The consortium's contract with the vendor selected will include provisions for technical support, upgrades and training.

Q. What training will my staff receive?

A. The automation vendor will train staff on all the modules of the new system and will provide ongoing technical support after the new system is implemented.

Q. What is the State Library's role in this project?

A. They are facilitating the work of the task force and will provide grant funding for the start-up and migration costs.

Q. How much grant funding will the State Library provide?

A. The State Library is committed to helping fund the start-up costs, but the amount of support will have to be determined after the consortium receives formal quotes from vendors in early 2012.

Q. Why should I do this? / What benefits will my library receive?

A. There are several benefits that come from consortium membership:

- Your patrons will have wider access to all resources held by consortium libraries.
- There will be a much quicker turn-around time for requests, as well as saved staff time since the resource sharing will be via direct patron borrowing and the current delivery system rather than the traditional interlibrary loan process.
- The consortium may be able to negotiate lower costs
- You can save on cataloging costs by copying records from the consortium database instead of paying a vendor for them.

Q. What is direct patron borrowing?

A. Direct patron borrowing means that any patron in any library belonging to the consortium can place a hold request for materials in any other library that also belongs to the consortium. The request goes through the shared automation system automatically, requires less staff time to process, and will come to the patron generally within 2-3 days via the courier system funded by the State Library. This will depend upon the frequency of your delivery schedule.

Q. What would my library have to give up in order to be in a consortium?

A. Being part of a resource sharing consortium requires cooperation, the more cooperation, the more smoothly things work for patrons. That said, as a member of the consortium you will help

## Attachment 1

determine established and agreed upon cooperative policies and procedures. You will have to participate in the chosen automation system. You will have to participate in the state-wide courier system. You will have to open your collection to borrowing from other libraries in the consortium. On the staff side, libraries may elect to use all the functionality provided in the contract or not, as they choose. They will still manage their own book selection process and decide on how many days per week they want the courier service to come by their libraries.

Q. What activities has the task force done in preparation for creating a new consortium?

A. Since December 2010, the task force has:

- Used a telephone survey to determine libraries' level of satisfaction with their current automation systems, whether they plan to migrate to another system, and if so, when.
- Met with three Missouri organizations, MLNC, MOBIUS and MOREnet, to find out what services each could offer to support a library automation consortium.
- Attended web meetings with open source software service providers Equinox (Evergreen software) and ByWater Solutions (Koha software) to learn about the software and service support options.
- Contacted several consortia in other states to find out what software they are using and what their experience has been.

Q. Are you looking only at open source software vendors for the new automation system? Do you have specific vendors in mind for the RFP?

A. We expect to look at both proprietary and open source vendors. In addition to the vendors listed above, we have heard expressions of interest from both Innovative Interfaces, Inc. and SirsiDynix. Once the RFP has been issued, we may hear from other vendors as well.

Q. What is open source software?

A. Open source software (OSS) is computer software that is available for free. It has been developed jointly by a non-profit group and made available for users to install. It does not belong to a for-profit corporation, unlike proprietary software. Users can also study, change, improve and at times also distribute the software. Libraries using this free software must either have in-house staff to troubleshoot problems and install upgrades, or they more commonly have a contract with a technical support provider to provide these services.

How long will it take for this project to get started?

- We hope to send out a formal Request for Proposal to vendors in early 2012 (Please see the timeline at the end of this FAQ).

My board is not ready to migrate this year: can I join later?

- Yes, we are planning on keeping the membership open in the future, since some libraries may be bound by existing automation vendor contracts or trustee decisions to keep their current automation system in place for some years after the consortium start up has been completed.

***If you have questions after reading this FAQ, you may call Jeanette Piquet at 314-645-6002.***

## Attachment 1

### Timeline

2011

- |            |   |
|------------|---|
| June 15    | Task force mails letter, FAQ and Letter of Interest form.   |
| July 15    | Deadline for receipt of Letter of Interest  |
| July 22    | Task force sends out Request For Information to vendors.  |
| August 22  | Deadline for receipt of vendor no-obligation estimates  |
| Sept 1-7   | Task force meets to review estimates  |
| Sept 15    | Task force sends out Letter of Intent form and date and agenda of first consortium meeting (will be in 1 <sup>st</sup> week of December just before MPLD meeting.). |
| October 15 | Deadline for receipt of Letters of Intent   |
| December   | Consortium holds first meeting one day prior to MPLD meeting (Tan-Tar-A)  |

**Letter of Interest**  
**Missouri Public Library Shared Automation Consortium Proposal**

**Yes, the library wants to be a part of the RFI for a public library shared automation consortium.**

- I have reviewed the proposal letter for building a consortium.
- I authorize the Missouri Public Library Automation Task Force to conduct a Request for Information process based on the proposal, the statistical data requested from us and this Intent to Participate.
- I understand that the RFI seeks no-obligation estimates from the vendors designated in the attached "FAQ" and that these estimates may not be the same as the formal quotes that will be requested after the consortium has actually formed.
- We understand that after the vendor estimates have been received by the Task Force, we will receive a second letter, a "Letter of Intent," that will give us the opportunity to participate in the formation of the consortium and a formal procurement process.

By signing below, you certify that you are authorized to commit this library to the Letter of Interest:

Library Name: \_\_\_\_\_

Name (printed): \_\_\_\_\_

Signature: \_\_\_\_\_ Position/Title: \_\_\_\_\_

Date: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

Email address: \_\_\_\_\_

If not interested, please indicate below:	
No interest at this time: _____	Library: _____
Your name: _____	Date: _____

**PLEASE RETURN THIS PAGE BY July 15, 2011**

BY FAX: You may fax the form to 314-781-3434, Attention: Jeanette Piquet

BY MAIL: send it to:  
Jeanette Piquet, Director  
Richmond Heights Memorial Library  
8001 Dale Avenue  
Richmond Heights, Missouri 63117-1448

(For more information, you may call Jeanette Piquet at 314-645-6202)