DALNET Executive Committee Meeting

Wayne State University
Undergraduate Library, Dean's Conference Room, 3rd Floor

April 27,2009
9:30 am – 12:00noon

Committee members in attendance: C. Agnew, M. Auer, J. Campbell, M. Ketcham, M. Sheblé, K. Tubolino, S. Yee

Guests in attendance: S. Bowers

1. **Call to order, 9:40 am – M. Ketcham**

2. **Approval of February 23, 2009 Minutes – M. Ketcham**

   Action
   K. Tubolino : Motion to approve minutes as submitted.
   M. Sheblé : Seconded
   Motion carried unanimously.

3. **Treasurer's Report – S. Bowers**
   Although the budget, current through April 16, 2009, shows an excess of revenues, S. Bowers believes that the budget will be balanced by the end of the budget year. Efforts were made to be on track and to resolve some long standing issues. One issue still not settled is contract negotiations affecting the salaries of some DALNET staff. Once settled, staff may be receiving retroactive increases in salary. The largest savings in the budget comes from credits for contributing original catalog records to OCLC. There were no new postings for interest to the DALNET Reserves since the Board meeting, and there were no grant applications submitted for consideration this quarter.

4. **Budget Planning**
   The floor was opened to discussing the budget year 2010-2011. WSU expects to experience further budget cuts. The end of the Single Database Project should bring in savings up to $10,000 - $20,000 on software maintenance. Expenses projected to increase are with personnel salaries and maintenance costs. DALNET has been trying to keep institutions as close as possible to the formula to keep costs stable for everyone. Keeping a flat rate for members may be optimistic given the current economic crisis. DALNET may need to be open to assisting members that need help paying their fees via the reserve fund. One way to help keep costs down for members is by brining new members into DALNET. S. Bowers intends to continue working on seeking new members in the next calendar year, after the single database is completed.

Action:
The Committee has asked S. Bowers to supply a one page summary of the benefits of belonging to DALNET along with a possible areas to save in the budget by the next board meeting.

5. **Review of Personnel – S. Bowers and S. Yee**
Last week, Sharon Almeranti accepted a new position with Bob Harris' office. Rachel Malone, Budget Analyst II, who is currently with the Dean's office, is acting as temporary DALNET Treasurer. Amy Conti will be taking on more administrative duties. S. Yee is optimistic with these current appointments. In the DALNET office, Cathy Wolford is up for a promotion and raise after serving 3 years in a Librarian I position. She has met the criteria for Librarian II and has initiated the year long process which, if approved, will result in a promotion and salary increase dictated by WSU and union contracts. George Marck has been with WSU for 35 years and with DALNET for 25 years. Plans are in the works to do something in recognition of his many years of service.

6. **Review of Grant Applications – S. Bowers**
There are no grant applications to review at this time.

7. **MeL MARC Records Service Task Force Report – M. Sheblé and S. Bowers**
A report was submitted by the MeL MARC Records Service Task Force consisting of Steven Bowers (DALNET), Maria Danna (OCL), Pat Higo (UDM), Phyllis Hills (MCC), Loretta Hunter (WCCCD), and Mary Ann Sheblé, Chair (OCC). The charge of the task force was to investigate vendors and products that offer delivery of MARC record collections for eSerials and information on link resolvers. The task force compared costs and services for 3 vendors, EBSCO, SerialsSolutions and TDNet, and found that each vendor had different pricing models. EBSCO offers the least expensive solution. M. Auer recommends that the Task Force pursue determining levels of participation from the DALNET libraries. The task force will submit an online survey to poll members on their interest in participation and will determine cost benefit for DALNET.

8. **Single Database Progress Report – S. Bowers**
Wayne County Community College recently went live in the Single Database. There were 10 patron records that had some problems, but otherwise no other issues. Marygrove is in the test database and will shortly be in production as well. Marygrove is the first member in the Single Database that more fully uses the Acquisitions Module. The last three libraries, MCC, OCC and UDM are planning on being added as scheduled. DALNET is profiling MeLCat for the Single Database to see if there are compatibility issues with our catalog records.

9. **DALNET Projects Updates – S. Bowers**
DALNET is working on a MeL MARC report (as reviewed earlier). S. Bowers is in contact with vendors getting information and pricing quotes for the authority work project which is scheduled for next year. The digital repository taskforce is also working on a report. Server work is scheduled for the summer. C&IT is moving any

non-Wayne servers and DALNET will experience a shut down day. All other projects are moving forward.

10. **SirsiDynix Updates – S. Bowers**

The company seems to be financially stable, and they are heavily investing their efforts to produce Symphony. In comparison, Symphony does not have as many features as Horizon. SirsiDynix will eventually phase out Horizon, but they have not announced when. There is at least a two year project plan to keep Horizon around, and then another two years lead time when the company decides not to support it any more. S. Bowers suggested that the Board may want to look at different catalog enhancement products for next year, especially one with a discovery layer feature for keyword searching.

11. **Other Announcements**
   - Jerry Bosler has returned to Macomb County Community College as interim director.
   - WSU is hosting a Lincoln exhibit until May 1 and is looking forward to the grand reopening of their Medical School on June 5.

12. **Next Executive Committee meeting** – July 27, 2009, UDM (tentative)
    Next Board meeting – June 22, 2009 at WSU

13. **Adjournment**

    Action
    M. Auer : Motion to adjourn.
    M. Sheblé: Seconded.
    Motion approved unanimously.
    Meeting adjourned at 11:47.

    Minutes submitted by Maria Ketcham, July 18, 2009.
    Minutes approved by the DALNET Executive Committee, XX, 2008.

MeL MARC Records Service Task Force
Report to the DALNET Board of Directors
April 27, 2009

Executive Summary

Purpose

The DALNET Board of Directors asked for information about the feasibility of purchasing MARC records for all serials available through Michigan Electronic Library (MeL) databases. This Task Force was established to complete the investigation and submit the findings to the Board. Optional link resolvers (see Appendix D) were also priced, since some vendors include link resolvers as an add-on at minimal cost to A-Z with MARC services. Some DALNET libraries have expressed interest in participating in a joint-DALNET purchase for a link resolver.

Charge

The charge of the Task Force is to investigate vendors and products that offer delivery of MARC record collections for eSerials, including separate information on link resolvers, and to also obtain cost quotes for such services. This TF will be responsible to report the findings/recommendations to the Executive Committee and Board as soon as the work is completed, for possible implementation in 2009.

Recommendations

(1) Purchase an A-Z (title list) with MARC record service for DALNET.

(2) Determine levels of participation for DALNET libraries.

(3) If a decision is made to subscribe to MeL MARC records, establish an implementation task force.

MeL MARC Records Service Task Force
Report to the DALNET Board of Directors
April 27, 2009

Submitted by: Steven Bowers (DALNET), Maria Danna (OCL), Pat Higo (UDM), Phyllis Hills (MCC), Loretta Hunter (WCCCD), Mary Ann Sheble, Chair (OCC)

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Process
- Members of the Task Force acquainted themselves with the experiences of other libraries using vendor-supplied MARC records for database serials by reviewing and discussing the following article:
  Kemp, Rebecca. "MARC Record Services: A Comparative Study of Library Practices and Perceptions," *The Serials Librarian* 55 (3), 379-410 (2008)
- S. Bowers contacted a group of six vendors that offer MARC record services for information. Three vendors responded (EBSCO, Serials Solutions, and TDNet). S. Bowers and M. Sheble met with the vendors during ALA Midwinter 2009 to discuss their products. Questions were provided to these vendors (Appendix A) and used as a basis for discussions.
- Based on vendor responses to the questions, the Task Force decided to pursue preliminary cost estimates for their services and to request current customer references. Email and phone conversations were used to obtain initial information and for clarification.
- The Task Force sent a standard set of parameters and a title count/overlap analysis to the vendors so that cost estimates would be based on common criteria.

- Vendors were cautioned that their cost estimates were non-binding, and that more formal estimates could be obtained later through Wayne State University, depending on the DALNET Board of Directors' decision.
- The Task Force reviewed recommendations (Appendix B), estimates, and parameters associated with the cost estimates, plus access and authentication options to ensure MARC record services would meet the varying requirements of member libraries.

Findings

The chart in Appendix C shows the parameters on which the Task Force evaluated A-Z with MARC record services. Information from vendors, product literature, and current customer references were used in the evaluation. There is a great deal of consistency in the quality of the records and services offered by the three vendors. On the basis of this evaluation, the Task Force concluded that any one of the vendors would provide acceptable records and services.

Pricing Options

The main differences between the vendors relates to pricing models. The advantages of the different models will depend on DALNET's preferences for implementing a MARC record service.

The base package for all three vendors is the MARC record and the A-Z service. Vendors include some customization, testing, and technical support in base costs. All costs are annual, with price reductions for multi-year purchases. All vendors provide the option for libraries to add MARC records for other databases for an additional cost.

For all libraries participating in a DALNET MARC record service, the A-Z service of the selected MARC record provider would need to be used. All vendors provide the option for individual libraries to subscribe for coverage of non-MeL database journals at an additional cost.

Base prices for link resolvers cover citation-to-full text for the MeL databases only. Separate subscriptions would need to be maintained for libraries that wish to provide link resolver capabilities for additional services and/or databases. Libraries that are part of the DALNET merged database that wish to have a link resolver for MeL databases only could consider sharing the cost of a single subscription.

A-Z with MARC and link resolvers are separate services and products. An A-Z with MARC service could be purchased from one vendor and a link resolver could be purchased from another vendor. Better integration of services and streamlined work for the DALNET office and/or individual library technical personnel would possibly be advantages of subscribing to both products through the same vendor

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Brief descriptions of the A-Z title services and link resolvers are included in Appendix D.

EBSCO
A-Z with MARC: $2,000/installation/year

- EBSCO bases costs on the number of unique titles in the MeL databases and on the number of distinct instances of integrated library systems (ILS). For libraries in the DALNET merged database, DPL, and WSU, the total cost would be $6,000/year. If libraries currently have an A-Z service through EBSCO, they would pay on a prorated basis for the unique titles they have available in the non-MeL databases.

LinkSource (link resolver): $5,500/installation/year

- EBSCO bases costs for their link resolver on the number of distinct instances of integrated library systems (ILS) using a single instance of LinkSource. If libraries in the DALNET merged database, DPL, and WSU would subscribe to LinkSource, the cost would be $16,500/year.

Vendor Notes: Price reductions are provided for multi-year contracts and for purchasing multiple products and/or multiple instances of a product. These reductions would need to be negotiated.

Task Force Assessment: This is the least expensive of the A-Z with MARC services without factoring in a link resolver. This vendor could also be cost effective for libraries that wish to add MARC records and/or an A-Z service since pricing is based on unique records. MARC records for EBSCO databases are free. Libraries with current subscriptions to EBSCO's A-Z service would pay less because costs would be prorated on the basis of DALNET contributions to the service. These libraries are currently paying for all unique titles (including MeL databases), but would have pricing reduced to cover only non-MeL databases.

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SerialsSolutions

360 MARC Consortium Version (A-Z plus MARC): $17,200/year

- SerialsSolutions bases costs on the total number of titles in the databases as reflected in pricing tiers. Records could be loaded into all three databases under a single contract.

Member Access Fee for A-Z: $2,600/library and/or ILS installation/year

- The access fee would be paid once for each ILS installation/configuration. There would be no additional costs for current customers, such as WSU. If libraries participating in the DALNET merged database and DPL would subscribe, the cost would be $5,200.

If libraries wish to customize their version of A-Z to cover journal titles for databases beyond MeL, each would need to pay the access fee for their individual configuration.

360 Link (link resolver): $15,600/installation/year $46,800

- This cost for the link resolver is based on the number of MARC titles in the MeL databases. The estimate covers the articles in the MeL databases. Libraries that wish to provide a link resolver for databases beyond MeL would need to purchase their own instance of 360 Link.

Vendor Notes: If both 360 MARC Consortium Version (A-Z with MARC) and at least one instance of 360 Link were purchased, there would be a 5% discount applied to pricing. There is an additional 10% discount for a 2-year license. MLC discounts are also available for DALNET and MLC member libraries.

Task Force Assessment: This could be feasible for A-Z with MARC (360 MARC) if all three ILS instances would participate, discounts were applied and central costs of MeL database records would make it cost effective for libraries in the DALNET merged database and DPL to share the current WSU license. Another factor to consider is the number of libraries currently subscribing to SerialsSolutions products, as these libraries may have a vested interest in staying with their products. Pricing for 360 Link was of concern to some members of the Task Force. Since we do not currently know how many libraries wish to add MARC records for non-MeL databases and the amount of title overlap would need to be determined, it may or may not be more expensive for libraries that wish to add MARC records for non-MeL database titles.

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TDNet

A-Z with MARC: $12,500/year

- TDNet bases costs on the number of unique titles in the MeL databases, subject to tier pricing. The bottom tier is up to 5,000 unique titles. MARC records covered by the license could be loaded into all three ILS installations. TDNet would provide quotes for adding MARC records and for A-Z services to cover non-MeL databases on an individual library basis.

eTable of Contents Alerting Service: $500/member

- Provided for titles available through TDNet. For scientific, technology, and medical (STM) titles, the rate is about 95%; 80% overall for all titles

A-Z with MARC plus TOUR (link resolver): $13,500/year

- TDNet would provide quotes for adding link resolver functionality for non-MeL databases on an individual library basis.

Vendor Notes: 33% discount for paying three consecutive years concurrently. For a five consecutive-year license, the annual subscription cost would be 2.5 times the license fee (payable upon order) plus 18% of the annual subscription payable each year.

Task Force Assessment: If there are a large number of libraries that wish to subscribe to a link resolver for MeL database articles only, this may be the least expensive option. Tier pricing is based on unique titles, so this may be an economical model for libraries that wish to add MARC records for non-MeL Databases.

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Recommendations

(1) Purchase an A-Z with MARC record service for DALNET.

The Task Force saw a number of advantages for providing access to MARC records through the OPAC for journal titles available in MeL databases.

- It reduces information scattering and increases the utility of the OPAC to users. The OPAC becomes a much more inclusive index of the information offered by the library.
- Databases may receive more use, by encouraging users to explore journals they may retrieve through subject searches.
- Users may be encouraged to use the library OPAC as a starting point for many of their information needs, since it becomes a more inclusive gateway for information, including electronic information.

(2) Determine levels of participation for DALNET libraries on the following:

move on this

- Interest in having MARC records for MeL databases appear in their OPACs.
- Interest in adding records for non-MeL databases to the DALNET subscription.
- Interest in subscribing to a link resolver for (a) MeL databases only and (b) MeL plus other databases.
- The number of libraries that have A-Z and link resolver services, and the vendors used.

Since pricing models mainly differentiate the three vendors, the configuration that DALNET selects will affect the cost advantage of one service over the other. This considers cost advantages to individual libraries, as well as direct costs to DALNET. The participation configuration also needs to be considered in view of billing for individual libraries and will determine whether an RFP is required. WSU requires an RFP for all potential purchases of $20,000 or more.

(3) If a decision is made to subscribe to MeL MARC records, establish an implementation task force.

The Task Force reviewed varying access options and methods for users to authenticate for off-site access. This review was done to ensure that MeL MARC service could function in a consortium environment. The Task Force recommends establishing an implementation team that is balanced between reference personnel and technical employees with expertise in ILS configuration and authentication. The team should include a member of the DALNET office.

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Appendix A

DALNET TF Questions
MARC Records for MeL Databases
ALA, Midwinter, 2009

1. Cost quotes and what are quotes based on? If based on number of titles, are their "tiers" or record limits for pricing scales? The databases we are interested in for this service are listed here:

    http://mel.org/SPT--BrowseResourcesDatabases.php?ParentId=617

2. Is billing/contracting handled on a monthly, annual, and/or multi-year basis?

3. Can MARC records purchased be used in more than one online catalog? (Not all of our members are in a shared library database)

4. What is the source of the MARC records your company provides?

5. Can MARC records have custom work done prior to delivery, i.e. special notes/values in specified fields and subfields?

6. How often are MARC record updates provided? What type of updates are provided for MARC records, i.e. complete reload, changes, additions, corrections reports?

7. Is the link resolver platform independent?

8. Is there an online administration portal that is configurable by the customer?

9. Is an "overlap analysis" report available (via request or an online admin portal) to compare holdings in various vendor databases?

Appendix B

Reference Checks
A-Z with MARC Records Service

1. How long have you been receiving MARC records from [vendor].

2. Have you noticed any quality issues with full or brief records? (Such as incorrect ISSNs, incorrect use of diacritics, GMDs.)

3. Have there been problems with duplicate records in the same batch or overlay problems between batches?

4. Have there been problems with incorrect records being delivered (records not in your databases)? Record currency?

5. How would you characterize your work with [vendor] technical support during the setup? Ongoing?

6. On the average, how long does it take for [vendor] to adjust your profile when your database mix changes?

7. Does the user administrative module allow you the flexibility to make required changes yourself? (For example, changes to the databases that need to be included in your MARC service and interface customization.)

8. In what other ways do you find the user administrative module useful or inadequate?

9. What type of customization is done by the vendor to your records? Have there been problems with the setup or any ongoing problems in this area?

10. Are there any changes in your library profile that you plan to make within the year? (For example, changes in the frequency of batch files and types of records you would like to receive when CONSER records are not available.)

Appendix C
MeL MARC Record Service: Task Force Evaluation

MARC Record Services	EBSCO	SerialsSolutions	TDNet
Record quality (1)	Occasional duplicate brief and full records because brief records lack ISSNs (they have internal identifiers) and the overlay field is the ISSN. Some uniform title fields end in (Online: Online).	2	Because brief records do not have ISSNs (they have internal identifiers) and the overlay field is the ISSN, there are occasional problems with matching.
Service reliability for file production (2)	Vendor schedule=monthly files. Can be emailed or picked-up via FTP.	Frequency can be determined by user. Reliable service.	Frequency can be determined by user. Reliable service.
Corporate stability	Established, privately held company.	Held by ProQuest, established publically held company based in Michigan.	Based in Europe. Began marketing in the U.S. in 2007.
Functionality of services (3)	Variety of access methods. Consortia customers. (OhioLink, LOUIS – Louisiana academics). Standard customization available; other for a cost.	Variety of access methods. Consortia customers (Missouri state university system). Standard customization available; other for a fee.	Consortia customers. Provides a great deal of customization with standard fee.
Admin module	Receives high marks from references.	Receives high marks from references.	Relatively full functionality. Some reports still need to be requested.
Technical support	Receives high marks from references.	Some concerns expressed by reference who was a previous customer.	Receives high marks from reference.

Notes

(1) All vendors use CONSER records when available. On-the-fly records are created when CONSER records are unavailable. Subject access is not included on these brief records.

(2) Importance of this service varies by type of access selected. If library users are routed through the A-Z service, serial changes will be reflected dynamically, except for deletions. The TDNet reference recommended weekly file change loads to ensure information is up-to-date.

(3) All services allow for entirely new loads of files or files of updates (new, deleted, and changed).

Appendix D

Terms Definition and Explanation

A-Z Service: This is a locator tool that can be configured to list various subsets of library holdings with clickable links to content. Many libraries use these services to provide a searchable index of e-journals in database packages, free e-journals to which they wish to recommend to their users, and print/microform titles in their collections. Embargoes can be displayed, along with years covered by database providers. In the MARC service, A-Z services act as "traffic director" to route users between links in MARC records and content.

Link Resolver: A link resolver allows users to link from a citation in a database to the full-text article in other databases or other electronic resources that have been included in the link resolver configuration. Generally, link resolvers work at the article level, although they can also work at the journal level if configured to do so. For example, a link resolver can be configured in an integrated library system to allow OPAC users to link from records for print copies to electronic copies and vice versa. Open URL resolvers are based on the Open Uniform Resources Locator (Open URL) NISO standard that support metadata standards to support mediated linking. Since 2006, OCLC has served as the maintenance agency for this standard.

MARC Record Services: Vendor-supplied sets of electronic serial bibliographic MARC records that can batch loaded into integrated library systems. These records can be for materials in any format. DALNET is currently looking at the feasibility of loading MARC records for journals with electronic access. Vendors usually provide options to subscribers for providing access to users through the URLs in the MARC records: (1) Static URL (comes from the provider), (2) A-Z URL that routes directly to the journal, and (3) A-Z links that route users to the title listing in A-Z. Subscribers must select one of these methods.