



Director of ODIN

Report

ODIN Advisory Council

May 15, 2018

Director of ODIN:

Ellen Kotrba / began
3/16/2018

ellen.kotrba@ndus.edu

701-777-4865



*Together, let's build & create
opportunities while igniting success!*

Topics

- Proposed Cost Formula - Operating Expenses - FY19
- NEW Cost Formula - Statewide Databases - FY19
- **RFI** (Request for Information) → **RFP** (Request for Proposal)
 - Public/K12/Special Libraries
- **RFP** (Request for Proposal)
 - Academic Libraries+

Proposed Cost Formula - ODIN Operating Expenses





ODIN Budget Analysis FY19
July 1, 2018 – June 30, 2019

The ODIN budget supports three primary services: the integrated library system (ILS); the databases; and web proxy services. Of the total FY19 ODIN budget, the ILS accounts for 80% of the total (see Table 1).

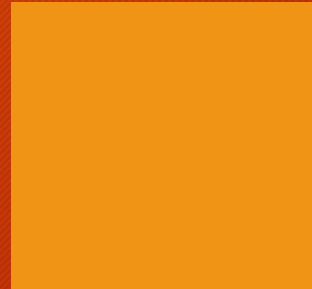
ILS Costs:	Approp	Non-Approp	Total	
Licensing, Maintenance, Etc		393,462	393,462	Service Total
Operational support (7.23 FTE)	610,157	150,202	760,359	1,153,822
TOTAL ILS COSTS:	610,157	543,665		
Database Costs:	Approp	Non-Approp	Total	
Licensing, Maintenance, Etc		282,340	282,340	Service Total
Operational support (.25 FTE)		5,025	5,025	287,365
TOTAL DATABASE COSTS:	-	287,365		
EZ Proxy Costs:	Approp	Non-Approp	Total	
Licensing, Maintenance, Etc		7,860	7,860	Service Total
Operational support (.02 FTE)	1,688	402	2,090	9,950
TOTAL EZ PROXY COSTS:	1,688	8,262		
Total Licensing		683,662	683,662	
Total Operational	611,845	155,629	767,474	
Total	611,845	839,291	1,451,136	1,451,136

Table 1

- The total cost for the ILS is \$1,153,822. This cost represents Ex Libris vendor fees and associated ILS operational support provided by ODIN staff. Of the total, ODIN appropriation supports 53% of ILS costs while member libraries share the remaining \$543,665 (47%). A breakdown of the Ex Libris Aleph charges include:

Ex <u>Libris</u> Aleph Maintenance	\$150,126
Ex Libris Aleph Subscription	\$ <u>66,633</u>
SFX Hosting (includes SFX maintenance)	\$ 82,830
Ex <u>Libris</u> Primo Subscription	\$ <u>78,830</u>
Ex <u>Libris</u> Primo Sandbox Subscription	\$ 9,484
Peter Ward – Authorities loaded into Aleph system	\$ 5,200

- The Minitex databases are included in the screen print but are a pass-through billing, funded by the Statewide Database cost formula. Note: ODIN receives \$111,975 of appropriated monies earmarked for databases. In FY19, this amount will pay down the Minitex bill.
- OCLC Ezproxy fees are listed.
- Operational support includes salaries for 7.5 FTE, travel, training, copying, professional development, postage, printing, supplies, telephone, meeting expenses, membership dues, etc.



After the ODIN appropriation is subtracted from the total cost of the ILS, ODIN libraries need to share the balance of \$543,665 across the membership. A three-step process is used to calculate the ILS costs for each library:

1. *Step One:* Establish the base cost – identify the cost of membership for each category of library in ODIN. The list of library types and associated costs are listed below and in Table 2:

Higher Education Research Library using Aleph, Primo and SFX	\$40,000
Higher Education Research Library using just Primo	\$36,908
Higher Education Post Graduate	\$10,000
Higher Education Baccalaureate	\$15,000
Higher Education Community College	\$ 5,000
North Dakota State Library	\$40,000
Public/K-12 >50,000 Bibs	\$ 5,000
Public/K-12 <50,000 Bibs	\$ 1,000
Carnegie Group	\$ 3,000

Table 2 also identifies the number of libraries in each membership category x Total Unit Base (membership fee). The base membership totals \$291,908.

FY19 ODIN ILS Costs					
INTEGRATED LIBRARY SYSTEM					
Billing Formula					
Base Membership:	# of Units			Total Unit Base	Total
H. Ed. Research Libraries:	1			40,000	40,000
H. Ed. NDSU Library (PRIMO only):	1			36,908	36,908
H. Ed. Post Graduate Libraries:	2			10,000	20,000
H. Ed. Baccalaureate libraries:	5			15,000	75,000
H. Ed. Community College libraries:	6			5,000	30,000
ND State Library:	1			40,000	40,000
Public/K-12 Libraries, >50,000 Bibs:	3			5,000	15,000
Public/K-12 Libraries, <50,000 Bibs:	32			1,000	32,000
Carnegie Libraries (Grafton, Lakota, McVille)	1			3,000	3,000
Total Units:	52			Total Base:	291,908
ExLibris Usage Costs:	# of Units from Ex Libris contract	ExLibris Unit Cost from Ex Libris contract	ODIN Unit Cost	Total Unit Usage	Total
Bibliographic Records:	3,300,000	0.025	0.013	0.038	125,879
Active Patrons:	122,015	0.660	0.372	1.032	125,879
				TOTAL:	543,665

Table 2



2. *Step Two:* Bibliographic cost and the Patron cost – evenly split the remaining \$251,757 between the two (\$125,879 each).
 - Dividing \$125,879 divided by the 3,300,000 threshold, we get .038 cents per bib record.
 - Dividing \$125,879 divided by the total of active patrons (122,015), we get 1.032 per bib record.

Notes:

- the Total Unit Usage cost less the Ex Libris Unit Cost provides the ODIN Unit Cost.
- Cust-540 is run in Aleph to pull the bib record & active patron counts for each library.

3. *Step Three:* Calculate the total – the bill for each ODIN library consists of three components (see Table 3):

The Base + Bib Usage + Patron Usage

TOTAL Base	BIB RECORDS	BIB Usage Cost	ACTIVE PATRONS	PATRON Usage Cost	FY 2018 BILLING	NEW AMOUNT	INCREASE / (DECREASE)
\$1,000	6,431	\$232	866	\$824	\$1,469	\$2,055	586
\$1,000	42,135	\$1,517	719	\$684	\$3,974	\$3,201	(773)
\$5,000	38,950	\$1,402	1,004	\$955	\$6,198	\$7,357	1,159
\$1,000	16,744	\$603	646	\$614	\$4,922	\$2,217	(2,705)
\$1,000	21,672	\$780	622	\$592	\$2,243	\$2,372	129
\$1,000	15,629	\$563	605	\$575	\$3,894	\$2,138	(1,756)
\$3,000	46,927	\$1,689	932	\$886	\$2,145	\$5,576	3,431
\$1,000	9,397	\$338	248	\$236	\$2,167	\$1,574	(593)
\$5,000	123,480	\$4,445	9,932	\$9,445	\$18,935	\$18,891	(44)
\$1,000	20,776	\$748	953	\$906	\$6,537	\$2,654	(3,882)
\$1,000	8,702	\$313	794	\$755	\$2,782	\$2,068	(714)
\$1,000	18,913	\$681	641	\$610	\$2,677	\$2,290	(387)
\$1,000	4,553	\$164	9	\$9	\$1,294	\$1,172	(121)
\$1,000	12,285	\$442	361	\$343	\$2,026	\$1,786	(240)
\$1,000	13,025	\$469	149	\$142	\$3,611	\$1,611	(2,001)
\$1,000	4,216	\$152	8	\$8	\$1,677	\$1,159	(518)
\$1,000	21,442	\$772	1,222	\$1,162	\$5,966	\$2,934	(3,032)
\$1,000	19,621	\$706	835	\$794	\$3,366	\$2,500	(865)
\$1,000	17,551	\$632	579	\$551	\$2,182	\$2,182	0
\$1,000	7,583	\$273	319	\$303	\$3,061	\$1,576	(1,484)
\$1,000	10,076	\$363	9	\$9	\$1,241	\$1,371	130
\$1,000	12,073	\$435	773	\$735	\$5,327	\$2,170	(3,157)
\$1,000	32,063	\$1,154	2,900	\$2,758	\$5,510	\$4,912	(598)
\$5,000	40,342	\$1,452	2,984	\$2,838	\$5,640	\$9,290	3,651
\$1,000	8,807	\$317	2	\$2	\$4,923	\$1,319	(3,604)
\$1,000	12,322	\$444	301	\$286	\$1,799	\$1,730	(69)
\$1,000	10,497	\$378	1,823	\$1,734	\$4,548	\$3,112	(1,436)
\$1,000	2,016	\$73	8	\$8	\$905	\$1,080	175
\$1,000	10,235	\$368	366	\$348	\$1,454	\$1,717	262
\$5,000	110,040	\$3,961	9,615	\$9,144	\$13,094	\$18,105	5,011
\$1,000	4,962	\$179	215	\$204	\$1,925	\$1,383	(542)

Table 3

NOTE:

- Most libraries will see a decrease in their billing. A few will see increases but ODIN will hold the libraries who have increases “harmless” until a new system is in place and those libraries will pay what their FY18 billing was. Those who have a “decrease” will pay the decreased charges.
-
- Once we have the FY19 operating expenses, we will be able to calculate the FY19 operating cost/library. Billing usually occurs in July unless prior arrangements are made for libraries who have a different fiscal year other than July 1-June30th.

New Cost Formula - Statewide Databases



Cost Formula for Statewide Databases EXAMPLE

For example, if the Minitex bill received by ODIN comes in at \$282,340 for FY19

Minitex Databases - Billing Formula:

TOTAL MINITEX BILL:	282,340
ODIN Appropriation:	111,975
Library Responsibility:	170,365



- a) The Statewide databases (via Minitex) pass-through amount is noted on the Cost Formula example as "TOTAL MINITEX BILL" – let's assume, that amount is \$282,340. In FY19, ODIN has an appropriated amount of \$111,975 (formerly used for eLibrary) to apply toward databases. This amount will be used to pay down the Minitex amount for FY19. The Total Minitex bill less any ODIN appropriation determines the total amount to bill the libraries – in our example, that turns out to be \$170,365.

Cost Formula for Statewide Databases Example

For example, if the Minitex bill received by ODIN comes in at \$282,340 for FY19

Minitex Databases - Billing Formula:	
TOTAL MINITEX BILL:	282,340
ODIN Appropriation:	111,975
Library Responsibility:	170,365

Individual Databases and costs:		% of Total Bill	Ind. Library Responsibility
Gale's K-12:	34,500	12%	20,817
EBSCO:	165,750	59%	100,014
ProQuest Newstand:	69,953	25%	42,210
Encyclopedia Britannica:	12,137	4%	7,324



- b) The individual databases and costs are then allocated for each vendor and the percentage (of the Total Minitex bill) is determined. Then that percentage of the Library Responsibility is applied. This determines the amount that will be billed to each type of library per vendor. Note: both the percentage and Ind. Library Responsibility amounts are rounded for display but calculated properly.

Cost Formula for Statewide Databases Example

Individual Databases and costs:		% of Total Bill	Ind. Library Responsibility
Gale's K-12:	34,500	12%	20,817
EBSCO:	165,750	59%	100,014
ProQuest Newstand:	69,953	25%	42,210
Encyclopedia Britannica:	12,137	4%	7,324



Gale's K-12 Usage:			Proquest Newstand Usage:		
Higher ed %	21.88%	4,555	Higher ed %	35.76%	15,094
K-12 %	64.57%	13,442	K-12 %	6.37%	2,689
Public %	12.83%	2,671	Public %	28.54%	12,047
ODIN %	0.69%	144	ODIN %	29.28%	12,359
Other %	0.03%	6	Other %	0.05%	21
Sub Total:		20,817	Sub Total:		42,210

EBSCO Usage:			Encyclopedia Britannica Usage:		
Higher ed %	72.13%	72,140	Higher ed %	2%	146
K-12 %	10.13%	10,131	K-12 %	62%	4,541
Public %	17.32%	17,322	Public %	1%	73
ODIN %	0.00%	-	ODIN %	35%	2,563
Other %	0.42%	420	Other %	0%	-
Sub Total:		100,014	Sub Total:		7,324

- c) The vendor statistics are then gathered to find out usage by type of library. 1) how much usage was attributed to Higher Ed per vendor; 2) how much usage was attributed to K12 per vendor; 3) how much usage was attributed to Publics per vendor; and 4) then an ODIN category – how much usage cannot be attributed to the other three categories per vendor.

Cost Formula for Statewide Databases Example

Gale's K-12 Usage:		
Higher ed %	21.88%	4,555
K-12 %	64.57%	13,442
Public %	12.83%	2,671
ODIN %	0.69%	144
Other %	0.03%	6
Sub Total:		20,817

Proquest Newstand Usage:		
Higher ed %	35.76%	15,094
K-12 %	6.37%	2,689
Public %	28.54%	12,047
ODIN %	29.28%	12,359
Other %	0.05%	21
Sub Total:		42,210

EBSCO Usage:		
Higher ed %	72.13%	72,140
K-12 %	10.13%	10,131
Public %	17.32%	17,322
ODIN %	0.00%	-
Other %	0.42%	420
Sub Total:		100,014

Encyclopedia Britannica Usage:		
Higher ed %	2%	146
K-12 %	62%	4,541
Public %	1%	73
ODIN %	35%	2,563
Other %	0%	-
Sub Total:		7,324



ODIN Total:	15,066	5,022	
Higher Ed Total:	91,936		96,958
K-12 Total:	30,803		35,825
Public Total:	32,113		37,135
Other Total:	447		447
	Library Responsibility:		170,365

- d) The bill amount for each vendor/type is then known and can be added together to figure out what amount to charge per type of library. The ODIN portion was split three ways and added to each type.

Cost Formula for Statewide Databases Example

ODIN Total:	15,066	5,022	
Higher Ed Total:	91,936		96,958
K-12 Total:	30,803		35,825
Public Total:	32,113		37,135
Other Total:	447		447
		Library Responsibility:	170,365

Higher Ed Libraries	FTE base		Public Libraries	Per Patron base	
	Total FTE:	43,737		Population Served:	672,646
	Per FTE cost:	2.22		Per Patron cost:	0.06
K-12 Libraries	9-12 Grader Students base		Other Libraries	Per Patron base	
	Total 9-12 Students:	30,308		Population Served:	1,000
	Per Student cost:	1.18		Per Patron Cost:	0.45

A per patron cost is calculated by using FTE for Higher Ed; # of students in grades 9-12 for K12 and total population served for public libraries.

To figure out what an individual public library share would be – the population served by library is obtained from the ND State Library (LSA Population, Community Facts) – for this example, let's assume 118,523 – that number is then calculated to be .176% of the total public library population of 672,646 (from our example). The total bill for public libraries is \$37,135 (from our example) – we multiple \$37,135 x .176% to retrieve the individual public library share of \$6,535.76

Note: in the example, if there would be no ODIN Appropriations amount, the total public library share in example would be \$61,543 and the individual public library share would be \$10,831.68

RFI - Public/K12 Libraries

- Released February 26, 2018 & Received 8 packets by closing April 6, 2018
 - Apollo (Biblionix)
 - Atrium (Book Systems)
 - Koha (LibLime)
 - Library Solution (TLC/The Library Corporation)
 - OpenAthens, Discovery Services, Full-Text Finder (EBSCO)
 - Polaris (III/Innovative Interfaces, Inc)
 - Symphony (SirsiDynix)
 - Evergreen (Equinox)
- Rita Ennen, Mary Soucie, Wendy Wendt - committee reviewing information
- RFP may be written & released depending on results of the RFI review



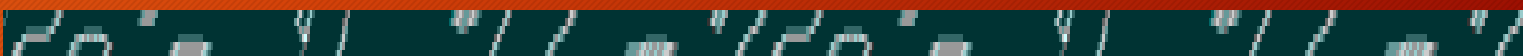
RFP - Academic Libraries +

- Not Yet Released - expected to release - May 2018
 - Expect at least two systems to respond
 - Alma (Ex Libris)
 - WorldShare (OCLC)
- Committee so far...
 - Shelby Harken & Laurie McHenry / UND campus
 - Mary Soucie / ND State Library
 - Amy Reese / NDSU Libraries



Topics

- **OPERATIONS**
 - Staffing
 - 2018 ODIN Work Day
 - Alma ILL to Aleph ILL & Aleph ILL to Alma ILL
 - Data Refresh on Sandbox (Test server)
 - Annual Patron Delete Project
 - ODIN listserv options
- You Heard It Here Communication clips
- Online Newsletter ... ODINFO



CONTACT INFORMATION

- <http://www.odin.nodak.edu/contact>
 - One does not have to be logged in to view



Ellen



Ginny



Lynn



Linda



Al



Cheryl Hoffmann, Administrative Support Specialist
Billing, Statistics, Administrative Tasks,
Travel Assistance, Mail

777-6105

cheryl.hoffmann@ndus.edu

Two vacant position at the moment -
Ellen's old position & Jonathan Moorman (web developer)

ODIN Contact Information

ODIN Office Hours

Monday through Friday, 8:00a.m. to 4:30 p.m. email: - [all ODIN staff](#)

Emergency Procedures

If you are experiencing an Urgent problem with any ODIN service please follow the emergency procedures below to receive the most expedient resolution to the problem.

Call **701-777-6346** – leave message if necessary as all ODIN staff will get the message.

Urgent means that the entire system or module is down, either for one library, a few libraries, or all libraries. No work can be done by your staff, and/or the online catalog is unavailable. Data integrity maybe compromised and work in progress may be lost.

ODIN Maintenance Hours are Saturday @ 6pm through Sunday @ 1pm.

If ODIN is not available during this time, please understand that maintenance may be underway.

Mailing address:

ODIN / North Dakota University System
Core Technology Services
4349 James Ray Drive
PO Box 13597
Grand Forks, ND 58208-3597

2018 ODIN WORK DAY

- 11 presentations
- Over 38 participated
- Will be an annual event
- Be thinking of new topics
- Plans are to have other work days in:
 - Fargo
 - Bismarck
 - Minot
- Visits to all libraries

Things are Happening

- NDSU Publishing in Primo
 - Alma publishing & harvest @ 3:30am, 9:30am, 3:30pm, 9:30pm
- Propose Aleph Publishing schedule for Primo
 - ALEPH publishing & harvest is currently @ 4:30am
 - Propose ALEPH publishing & harvest @ 4:30am, 9:45am & 3:30pm
- Indexing of all occurs:
 - 5:30am, 10am, 4pm, 10pm
- Data Refresh of Sandbox will occur each Jan & July
- Annual patron delete project
- Alma ILL to Aleph ILL
- Aleph ILL to Alma ILL
- NDSU released new interface to Primo on 5/14/2018
 - <http://odinlibrary.org/primo-ndsu.html>

Primo New UI Project

- http://odin-primostaging.hosted.exlibrisgroup.com/primo-explore/search?vid=nds_u_new
- http://odin-primostaging.hosted.exlibrisgroup.com/primo-explore/search?vid=und_new
- http://odin-primostaging.hosted.exlibrisgroup.com/primo-explore/search?vid=nds_new
- http://odin-primostaging.hosted.exlibrisgroup.com/primo-explore/search?vid=ndv_new

ODIN Listserves - @ LISTSERV.NODAK.EDU

- ODIN-DIRECTORS
 - ODIN Library Directors + others - for issues/news regarding ODIN Advisory Council Meetings, ODIN policies, etc.
- ODIN-SYSLIBRARIANS
 - System Librarians - those who handle tables, new features, online environment, etc.
- ODIN-TECH
 - System Librarians + any other individuals who install clients, deal with network issues, ip issues, etc.
- ODIN-LIBS
 - should include all ODINland staff
- ODINFO
 - should include all ODINland staff + other consortia (such as MnPALS, Minitex, etc.) + interested contacts

ODIN Listserves - @LISTSERV.NODAK.EDU

- ODIN-ACQ-SER
 - staff who are interested in Acquisitions & Serials issues
- ODIN-CAT
 - staff who are interested in Cataloging issues, Authorities & indexing
- ODIN-CIRC
 - staff who are interested in Circulation, Inventory & Cash issues
- ODIN-ILL
- staff who are interested in Interlibrary Loan issues
- ODIN-SERIALS
 - staff who are interested in Serials issues, Binding & Routing
- ODIN-PRIMO
 - staff who are interested in the PRIMO discovery interface
- ODIN-REFERENCE
 - staff who are interested in web OPAC issues as well as other issues affecting a Reference Desk
- ODIN-PLIF
 - staff who are interested in automatic loading of academic patron records

ODIN Listserve



Collaborate, Comment,
Use Your Voice,
Share Your Ideas

- To see who is subscribed to lists, send an email to:

LISTSERV@LISTSERV.NODAK.EDU

with "no" Subject Line and this message in the body of the email:

REVIEW NameOfList

(for example: REVIEW ODIN-CIRC)

FUTURE PROJECTS

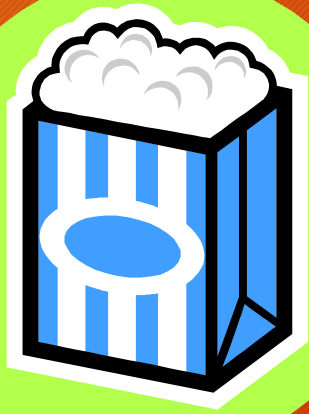
- Monthly ODIN Newsletter
- “You Heard It Here ...” communication clips



THANK YOU !

ellen.Kotrba@ndus.edu

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ODIN Steering Committee - OESC

- Chair - Rita Ennen
 - One vote per member
 - Minimum: One face-to-face meeting planned per year
 - All meetings online
 - Minutes:
<http://www.odin.no.dak.edu/content/esc-meeting-minutes>
- Members:
 - Joe Mocnik/
Academic Libraries
 - Stephanie Walker/
Academic Libraries
 - Wendy Wendt/
Public libraries
 - Susan Moberg/
School Libraries
 - Phyllis Bratton/
Member-at-large
 - Mary Soucie/
State Librarian
 - Rita Ennen/
OAC Chair
 - Ellen Kotrba & ODIN staff/
ex-officio

ODIN Advisory Council - OAC

- Chair - Rita Ennen
- Members - lead in each ODIN library
- One vote per library
- Minimum: One face-to-face meeting planned per year
- All meetings available online
- Minutes: http://www.odin.nodak.edu/advisory_council



ODIN User Groups - re-ignited

Academic

- Acquisitions
- Serials
- Circulation
- Interlibrary Loan
- Cataloging
- Discovery Interface
- System Librarians

Public / K12

- Circulation
- Interlibrary Loan
- Cataloging
- Discovery Interface
- System Librarians

Every User Group member is from an ODIN member library.

- The User Group assesses and prioritizes the recommendations of the User Groups and Work Groups and communicates these to the OAC Chair.



ODIN Work Groups - OWG

Academic

- Acquisitions/Serials
- Circulation/Interlibrary Loan
- Cataloging
- Discovery Interface/Systems

Public / K12

- Circulation/Interlibrary Loan
- Cataloging
- Discovery Interface/Systems



Work Group members are a subset of User Group - no more than 10 members from each discipline in one work group

- The Work Groups assesses, enhances, and tests the library application. These groups address specific concerns.
- These groups tackle library application issues and works with the ODIN Office to resolve. These groups also support policy, brought by a User Group to the OAC.

THANK YOU !

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STATEWIDE DATABASES



Statewide Databases – Minitex Contract

When is the contract up? June 30, 2019 -
perhaps June 30, 2020

Meir Taskforce (under consideration is a new name):

Shared E-Resources Task Force

Minitex:

- may extend the current contract one year if vendors agree
- vendors would be asked to honor FY2019 pricing and if that is unacceptable, to raise prices a maximum of 3%
- Minitex will notify us when decisions are made
- are there any perceived gaps in coverage/needs of ND libraries

Statewide Databases - Minitex Contract

If Task Force is activated, How does the process work?

- Task force members are named (4 from ND, 4 from SD, rest from MN)
 - most meetings will be online so a PC with audio/video/internet is required
- Task force is asked to draft RFP requirements
- Task force is asked to review RFP responses from vendors & narrow to top choices
- Top choices will be asked to demo their database offerings on site in the Cities
- Task force members will be invited to participate in vendor demos on site in the Cities
- Task force will be asked to consider, review, and recommend resources on behalf of all library types
- Recommendations of task force are advisory in nature.
- Task force members are called upon to share information & respond to questions regarding shared e-resources during the life of the contract - which is typically 5 years.

Trial access is set up sometime during entire task force cycle for all to use and test out. Details will be forthcoming during the process.

THANK YOU !

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