

Academic Year 2023-2024

Briefing Book



OhioLINK

Connecting Libraries, Learning & Discovery

An **OH·TECH** Consortium Member

Table of Contents

ABOUT OHIOLINK	3
VISION	3
COMMITMENT.....	3
VALUES	3
OHIOLINK HISTORY	4
GOVERNANCE AND ORGANIZATIONAL STRUCTURES	6
OHIO REVISED CODE.....	6
MEMBER OF OH-TECH	6
EXECUTIVE DIRECTOR.....	6
OHIOLINK CENTRAL ORGANIZATION STRUCTURE	6
CHARTER MEMBERS	6
LEADERSHIP COMMITTEES.....	8
POLICY TEAMS.....	11
IMPLEMENTATION TEAMS.....	13
OTHER GROUPS.....	14
OHIOLINK SERVICES	15
RESOURCE SHARING VIA THE OHIOLINK CENTRAL CATALOG.....	15
ELECTRONIC RESOURCES.....	17
AFFORDABLE LEARNING INITIATIVES.....	18
ELECTRONIC RESOURCE PURCHASING MODELS	18
OHIOLINK SHARED COLLECTIONS PRINCIPLES.....	18
CONTENT CATEGORIES	19
PURCHASING INFO BY RESOURCE TYPE	19
FINANCIAL OVERVIEW	21
FISCAL AGENT	21
FUNDING TYPES	21
MEMBER PORTAL.....	23
APPENDICES.....	24
APPENDIX 1: OHIOLINK CONTACT INFORMATION	25
APPENDIX 2: OHIOLINK ORGANIZATIONAL CHART	26
APPENDIX 3: OHIOLINK MAP	27
APPENDIX 3: COMMUNICATIONS AND INFORMATION FOR DIRECTORS	28
APPENDIX 4: OH-TECH ORGANIZATIONAL CHART	29
APPENDIX 5: LIST OF ABBREVIATIONS AND ACRONYMS USED BY OHIOLINK	30
APPENDIX 6: STRATEGIC FRAMEWORK	34
APPENDIX 7: LIBRARY ADVISORY COUNCIL ACTION ITEMS PASSED (LAST 5 YEARS).....	36
APPENDIX 8: INVOICING GUIDELINES	38
APPENDIX 9: OHIOLINK MEETINGS AND COMMUNICATIONS CODE OF CONDUCT	39
APPENDIX 10 OHIOLINK CONSORTIA ACCESSIBILITY STATEMENT	40
APPENDIX 11: SAMPLE MEMORANDUM OF UNDERSTANDING	42
APPENDIX 12: OHIOLINK HIGHLIGHTS TIMELINE	61

About OhioLINK

The Ohio Library and Information Network ([OhioLINK](#)) is a consortium of [117 members](#) who work together to provide Ohio students, faculty and researchers with the information they need for teaching and research. Serving more than 800,000 students and 48,000 faculty and researchers, OhioLINK's membership is distributed among 88 different Ohio colleges and universities. OhioLINK membership includes the State Library of Ohio, 16 public university libraries, 48 independent college libraries, 23 two-year college libraries, 16 branch campus libraries, 8 law school libraries and 5 medical school libraries.

Vision

OhioLINK is an innovative leader among library consortia, working collaboratively to deliver the resources and services Ohio students, faculty, and citizens need to achieve their academic goals and aspirations.

Commitment

OhioLINK staff and members approach our work with these principles embedded in everything we do:

- Equity, diversity, and inclusion as foundational elements of our work
- Accessibility and the elimination of access barriers
- Collaboration among staff, members, and partners
- Open and transparent communications

Values

Our core aspirational values guide and support our work and provide the foundation of our organizational relationships.

Empathy. We respect the diverse perspectives of our colleagues.

Integrity. We hold ourselves accountable for our work as trusted partners and leaders.

Service. We work together mindfully to develop simple and creative solutions to complex problems.

Curiosity. We are open to new ideas and new approaches to our work, always seeking to encourage and expand knowledge to move forward.

Balance. We find joy in our work together, remaining flexible, and demonstrating grace to each other and to ourselves.

In 2022, OhioLINK completed a multi-year [Strategic Framework](#) to guide its future initiatives. The Strategic Framework is based on feedback gathered from OhioLINK members and positions the organization to support its 117 member libraries. As part of the Framework work process, OhioLINK also revised the organization's Vision, Commitment, and Values (as above.) The document is included in Appendix 6: Strategic Framework.

OhioLINK History

Establishing OhioLINK

OhioLINK, a cooperative venture of university libraries and the Ohio Department of Higher Education (ODHE - formerly Ohio Board of Regents), grew out of a 1987 library committee recommendation that “the state of Ohio implement, as expeditiously as possible, a statewide electronic catalog system.”

In response to this recommendation, ODHE established a steering committee representing librarians, faculty, administrators and computer systems managers from campuses throughout Ohio. After meetings, public hearings and conferences, the committee prepared and distributed a planning paper (November 1988); a Request for Information (February 1989); and a Request for Proposal (August 1989) to initiate a statewide electronic system.

In 1990, OhioLINK selected Innovative Interfaces, Inc., to develop the unique software system to create the OhioLINK Library Catalog and selected Digital Equipment Corporation for the computer hardware base. OhioLINK licensed four databases from University Microfilms International (UMI) for citations to millions of business, newspaper and periodical articles and to academic dissertations. These elements formed the foundation of the growing OhioLINK system of services.

In 1992, six universities installed OhioLINK systems and began the ongoing process of building the Central Catalog. Ten institutions began resource sharing through the Central Catalog in January 1994. In February 1996, OhioLINK began offering services through the World Wide Web.

Building Platforms and Applications

During the next decade and half, OhioLINK was a leader in providing an unprecedented level of access to electronic resources to its membership. It was unique in hosting much of this purchased content on its own content platforms. The Electronic Journal Center (EJC) first went live in 1998, enabling search across full text journal articles from several different publishers. Over time, OhioLINK’s electronic journals portfolio came to include over a dozen publishers, including big players such as Elsevier, Springer, and Wiley. OhioLINK launched its Electronic Theses & Dissertations (ETD) platform in 2002, providing a statewide repository for open access dissertations and theses produced at Ohio universities. The Libraries Connect Ohio (LCO) partnership with the OPLIN and INFOhio consortia representing public and K-12 libraries in Ohio began in 2003. This partnership leverages LSTA grant funding through the State Library of Ohio to provide online information resources to every citizen in the state of Ohio. Building upon the success of the EJC, the Electronic Book Center (EBC) first went live in 2007 hosting electronic books from multiple publishers in one search interface.

Organizational Changes

On September 9, 2011, Chancellor Jim Petro issued a directive to consolidate several state consortia into one consortium called the Ohio Technology Consortium, or OH-TECH. At the time, this included the Ohio Supercomputer Center (OSC), the Ohio Academic Resources

Network (OARnet), and the Ohio Learning Network (OLN). In October 2012, the Chancellor further directed that OhioLINK be added to the OH-TECH consortium. At the same time, the Chancellor appointed OhioLINK's a new executive director. To complete its integration into OH-TECH, OhioLINK changed its fiscal agent from Wright State University to the Ohio State University in 2013.

Discovery and Affordable Learning

Since that time, OhioLINK has undergone reorganization of staff and services to better meet its members' needs for shared services and resources into the future. In 2014, EBSCO's EDS discovery layer and Link Source link resolver were chosen as the result of an RFI process to replace an aging homegrown link resolver service. The Memorandum of Understanding (MOU) between OhioLINK and its member libraries was completely updated for the first time in 20 years. That same year, OhioLINK began centralized cataloging, providing MARC records to member libraries for shared electronic resources. In 2016, the Electronic Journal Center (EJC) was completely rebuilt, providing an enhanced user experience. OhioLINK implemented Rosetta to preserve its long-term investment in high-quality academic publications. In 2017, OhioLINK instated an updated committee structure to reflect current needs surrounding discovery and electronic resources.

In 2017, eStudent Services (now eTutoring), formerly part of the OH-TECH consortium in its own right, was integrated into OhioLINK. With this change, OhioLINK has expanded its portfolio to include online tutoring and affordable learning projects. These initiatives, like all of OhioLINK's work, serve to provide cost efficiencies in higher education in Ohio. eTutoring provides online tutoring support to students at no cost to them. Current affordable learning initiatives include Open Educational Resources (OER) and inclusive access textbook deals, providing lower-cost or no-cost course materials to students.

OhioLINK continually adds benefits for members; recent efforts include: securing Governor's Emergency Education Relief (GEER) funding to provide additional digital resources to support online and hybrid teaching and learning; upgrading its platforms for security, stability, and improved user experience; signing cost-neutral "read and publish" agreements with three major publishers; and funding Ohio faculty to explore the transition to low- or no-cost teaching materials. Perhaps the widest impact will come from receiving funding through the Ohio Department of Higher Education to replace the consortium's shared ILS. This extremely complex project is expected to continue through 2025.

See the OhioLINK Timeline in Appendix 12 for a more detailed history.

Governance and Organizational Structures

Ohio Revised Code

OhioLINK was formed by the Ohio Department of Higher Education (formerly Ohio Board of Regents) as a consortium under section 3333.04(U) of the Revised Code.

Member of OH-TECH

OhioLINK became part of the Ohio Technology (OH-TECH) Consortium in 2013. OH-TECH provides administrative support to Ohio's statewide technology infrastructure, which includes OhioLINK, the [Ohio Academic Resources Network \(OARnet\)](#), the [Ohio Supercomputer Center \(OSC\)](#), and the Research and Innovation Center. Funded by the Ohio General Assembly through the Ohio Department of Higher Education, OH-TECH reports to the Chancellor of the Department of Higher Education.

Executive Director

Effective May 29, 2008, the OhioLINK Executive Director is chosen by, reports to, and serves at the pleasure of the Chancellor of the Ohio Department of Higher Education.

OhioLINK Central Organization Structure

OhioLINK currently has 16 FTE staff members funded through its operating budget. See Appendix 2 for Organizational Chart.

Charter Members

The charter members are the original members of OhioLINK. They include Ohio four-year public institutions, private research institutions, a medical school, and the State Library of Ohio.

Bowling Green State University
Case Western Reserve University
Central State University
Cleveland State University
Kent State University
Miami University
Northeastern Ohio Medical University
The Ohio State University
Ohio University

Shawnee State University
The State Library of Ohio
University of Akron
University of Cincinnati
University of Dayton
University of Toledo
Wright State University
Youngstown State University

Leadership Committees

Library Advisory Council Coordinating Committee (LACCC)

The OhioLINK Library Advisory Council Coordinating Committee (LACCC), with the OhioLINK Executive Director, coordinates the ongoing efforts of the Library Advisory Council (LAC).

LACCC, in collaboration with the OhioLINK Executive Director, ensures effective and efficient use of OhioLINK's and participating institutions' resources, addresses current needs, and plans for future opportunities by:

- Coordinating OhioLINK strategic planning and implementation of initiatives
- Reviewing LAC meeting agendas prepared by the Executive Director
- Reviewing capital and operating budget proposals prepared by the Executive Director
- Drafting policy for LAC and OhioLINK Advisory Board approval

LACCC meets at least four times a year. The Chair works with the OhioLINK Executive Director to set the meeting dates and agenda and may call additional meetings as required.

[LACCC Membership](#)

[Current Roster](#)

- Four library deans or directors shall be selected from the charter members. They serve 4-year terms. The sequence of service is member-at-large, chair-elect, chair, past chair.
- The chair of the Independent Directors group. Serves a one-year term.
- The chair of the Two-Year/Regionals Directors group. Serves a one-year term.
- The OhioLINK Executive Director shall serve *ex-officio*.

All terms commence on January 1.

If an LACCC member is unable to serve or leaves his/her position at the institution, a replacement will be made on a case-by-case basis.

Nominations for charter member representatives are accepted by any OhioLINK member dean or director and appointed upon consensus of the LACCC.

The chair of LACCC also serves as chair of LAC.

The chair of LAC serves on the OhioLINK Advisory Board to provide strategic, policy, and programming advice, recommend projects and initiatives to support the effective and efficient use of resources, and assist the Executive Director in preparing Advisory Board agendas.

Library Advisory Council (LAC)

LAC reviews and approves all policies for carrying out OhioLINK programs as proposed by the three standing committees; discusses and approves major funding measures; and participates in strategic planning.

Membership

[Current Roster](#)

- Library directors from each of the charter members
- Three elected representatives from the Two-Year College/Regional Campus Directors group
- Three elected representatives from the Independent College Directors group
- One representative from the Medical Library Directors
- One representative from the Law Library Directors.

The chairs of the three policy teams also participate in LAC meetings.

Meetings

LAC meets in March, September, and December. The June meeting is a combined meeting of all directors (LAC, Independents, and 2-year/regional.)

Independent College Directors

Membership

[Current Roster](#)

Membership in the Independent College Directors group is comprised of library directors from the private independent colleges and universities in Ohio (excluding Case Western Reserve University and University of Dayton, which are charter members) that are members of OhioLINK. Representatives from this group are elected to LAC/LACCC and the policy teams for staggered three-year terms.

LAC Representatives

There are 3 LAC representatives from the Independent Directors group. They serve staggered 3-year terms.

LAC representatives also serve as Chair of this group in the third year of their term.

Meetings

Independent directors meet in March, September, and December, prior to the LAC meetings. The June meeting is a combined meeting of all directors (LAC, Independents, Two-year/regional, Law, and Medical.)

Two-Year College/Regional Campus Directors

Membership

[Current Roster](#)

Membership in the Two-Year/Regional Campus Directors group is comprised of library directors from the two-year colleges in Ohio that are members of OhioLINK, as well as library directors from the branch campuses of public universities. Representatives are elected/appointed from this group to LAC/LACCC and the policy teams for staggered three-year terms.

LAC Representatives

There are 3 LAC representatives from Two Year/Regionals. They serve staggered 3-year terms.

LAC representatives also serve as Chair of this group in the third year of their term.

Meetings

Two-Year College and Regional Campus directors meet in March, September, and December, prior to the LAC meetings. The June meeting is a combined meeting of all directors (LAC, Independents, Two-year/regional, Law, and Medical.)

Law Library Directors

Membership

[Current Roster](#)

Membership includes directors from the law libraries of Capital University, Case Western Reserve University, Cleveland State University, Ohio Northern University, Ohio State University, University of Akron, University of Cincinnati, University of Dayton, and University of Toledo.

Members meet at the discretion of the group. The group selects their own chair. The chair acts as the LAC representative and serves a 3-year flexible and renewable term. A representative to each policy team is elected/appointed by this group.

Medical Library Directors

Membership

[Current Roster](#)

Current membership includes medical library directors from Case Western Reserve University – Cleveland Health Sciences Library, Cleveland Clinic, Northeast Ohio Medical University (NEOMED), Ohio State University, Ohio University, University of Cincinnati Medical Center Library, University of Toledo Health Sciences and Wright State University.

Members meet at the discretion of the group. The group selects their own chair. The chair acts as the LAC representative and serves a 3-year flexible and renewable term. A representative to each policy team is elected/appointed by this group.

Policy Teams

Formerly known as standing committees, these groups became policy teams when the new OhioLINK structure was adopted in September 2017. The Policy Teams report directly to LAC.

Policy Teams Membership

Membership of the policy teams consists of

- One representative from each of the charter members
- One representative appointed by the Medical Libraries Directors group
- One representative appointed by the Law Library Directors group
- Three representatives appointed by the Two-Year College/Regional Campus Directors group
- Three representatives appointed by the Independent Colleges and Universities Directors group

Representatives for the charter members serve until replaced by their institutions.

Representatives from the Two-Year College/Regional Campus Directors group and the Independent Colleges and Universities Directors group serve staggered three-year terms and are elected by their respective groups. Representatives from the Medical Libraries Directors and the Law Library Directors serve until replaced by their respective groups.

Policy teams meet on varying schedules according to their needs, but no less than quarterly.

Each policy team has an OhioLINK liaison assigned to assist the committee in its work, assist with planning and provide logistical support.

The OhioLINK Executive Director appoints Chairs of the policy teams in consultation with the staff liaison and the out-going Chair.

Chairs of the policy teams serve a two-year term and may come from any of the member libraries of the committee. If the new chair is from an institution with a defined service term and serving as Chair would extend their service beyond their term limit, their term may be extended with the approval of the respective Directors' group. Chairs of the policy teams also attend LAC meetings to present reports and represent their respective communities.

Cooperative Information Resources Management Policy Team (CIRM)

[Current Roster](#)

The Cooperative Information Resources Management Policy Team (CIRM) focuses on cooperative resource management issues, both electronic and print, and recommends new policies and procedures. CIRM makes recommendations to the Library Advisory Council on renewals of existing resources and acquisition of new resources for OhioLINK. The policy team is responsible for the assessment and analysis of membership-wide resources using the appropriate metrics, including deselection and recommendations for management of purchased shared content in OhioLINK locally loaded platforms. CIRM also performs analyses and makes recommendations about shared print policy as appropriate.

Database Improvement and Discoverability Policy Team (DIAD)

[Current Roster](#)

The Database Improvement and Discoverability Policy Team (DIAD) focuses on metadata as it relates to integration between shared systems and local systems, authority work, database integrity and impact of displays and searching of metadata on end users in shared or integrated systems. This policy team is responsible, as appropriate, for evaluating OhioLINK central and contributing ILS/LMS systems as they relate to managing shared metadata

Inter-Campus Services Policy Team (ICS)

[Current Roster](#)

The Intercampus Services Policy Team (ICS) recommends policies and procedures for statewide resource sharing between institutions. ICS works with OhioLINK circulation -- sometimes referred to as PCIRC (patron-initiated circulation) -- among local sites and between local and the central site. This includes but is not limited to: analysis of consortial courier service; the recommendation of and updates to policies related to the implementation of PCIRC such as fines, reimbursements for lost material, and loan rules; and documentation of consortial processes necessary for PCIRC to implement ICS policy recommendations. The policy team also oversees document delivery systems for all types of materials including books, media, and journal articles between member institutions, and between OhioLINK and peer networks such as SearchOhio.

Implementation Teams

Implementation Teams are responsible for carrying out any necessary standardization of procedures, technology, and information at each institution to ensure the smooth integration of systems and a consistent information environment for OhioLINK central and distributed operations. Implementation Teams both carry out necessary tasks and procedures and provide feedback to OhioLINK staff and their peer community on operations and technology.

Every implementation team will have an OhioLINK liaison. The OhioLINK liaison is responsible for relaying relevant information between policy teams, implementation teams, and any OhioLINK staff members. In some cases, the OhioLINK liaison will also relay information between implementation teams and vendors, including OH-TECH units.

Lead Implementers

[Current Roster](#)

This group has existed since the beginning of OhioLINK. It continues to serve as a primary communication point for technical and logistical issues. Each OhioLINK member institution is required to have a designated lead implementer even if they participate in resource sharing through a shared catalog such as OPAL. Each OhioLINK member library has a representative on this team.

E-resources

[Current Roster](#)

The function of the E-Resource implementation team (ERIT) is to act on decisions made by CIRM in terms of packages, titles, etc. and to respond to CIRM and OhioLINK requests for data (usage, budget, title lists, etc.) to support negotiations and shared resource analysis. These responsibilities include but are not limited to taking local action necessary to accommodate changes in OhioLINK e-resource packages. Each OhioLINK member library has a representative on this team.

PCIRC

[Current Roster](#)

The function of the PCIRC implementation team will be to act on decisions made by ICS/LAC/OhioLINK to adjust and standardize the necessary local policies, technical settings, and procedures to ensure the smooth functioning of shared resources. Each OhioLINK physical delivery location has a representative on this team.

Accessibility Implementation Team

[Current Roster](#)

The Accessibility Implementation Team (ACCIT) acts on digital accessibility remediation and support requests in conjunction with appropriate local staff and the OhioLINK central office to ensure that OhioLINK's shared e-resources are available to all. The Team is also responsible for

communicating information about accessibility as it relates to OhioLINK shared collections and services to relevant local staff. Each OhioLINK member library has a representative on this team.

Other Groups

Project Teams

Project teams can be formed at the initiative of LAC, the Policy Teams, or OhioLINK staff in order to accomplish short-term goals or bounded projects. All project teams must have a charge, anticipated timeline, and a completed and approved OhioLINK project plan. If the project involves work performed or requested of OhioLINK staff, the project plan must be approved by the Executive Director. The initiating body is responsible for identifying and recruiting necessary personnel for project teams. Implementation teams are responsible for carrying out project plans that fall under their responsibilities without specific recruitment.

Adjunct Teams

These teams include OhioLINK library staff members but are broader in scope and intersect with other organizations or units outside of OhioLINK and member libraries. Their responsibilities, charges, and scope are usually determined outside of OhioLINK governance structures. The current adjunct teams are:

[Electronic Theses and Dissertation Center Advisory Council](#)

This group represents the interests of OhioLINK Electronic Theses and Dissertations (ETD) Center member institutions and authors to OhioLINK and the OH-TECH consortium for the administration and development of the OhioLINK ETD Center as a leading participant in the global ETD community.

[All Regional Depositories Groups/Teams](#)

The Regional Depositories Governing Council is responsible for depository project oversight and for developing guidelines for access to depository collections by all OhioLINK members. The Regional Depositories Coordinating Council will coordinate planning and activities among the OhioLINK five high-density depositories including budget oversight, facilities, capital projects and staffing.

[eTutoring Advisory Committee](#)

The eTutoring Advisory Committee works closely with OhioLINK to provide input, feedback, and guidance for the OhioLINK eTutoring Program. The committee meets quarterly to discuss issues and policies relevant to the eTutoring community and ultimately to uphold and improve the eTutoring experience for institutions, campus coordinators and students.

[Communities of Interest](#)

Member driven groups, intended for discussion around best practices, innovations, problems and solutions for common issues and situations on multiple libraries, while not being uniform across all members. The OhioLINK Central Office provides limited support.

Current Community of Interest (COI) groups include:

- Acquisitions - to discuss, analyze, and recommend best practices concerning Acquisitions.
- E-resources - to discuss electronic resource management issues, processes, and trends and sharing of local experiences, best practices, and workflows.
- Resource Challenges in Academic Libraries – to discuss academic libraries' resource challenge policies, best practices, and challenges.

OhioLINK Services

Resource Sharing via the OhioLINK Central Catalog

Implementation of the new Ex Libris Alma and Primo Library Services Platform

After a year-long competitive RFP process, in August 2023 OhioLINK [announced](#) its selection of Ex Libris [Alma](#) and [Primo](#) as its next shared library services platform, along with a suite of related products. Modernizing our consortium's library system software was funded by OhioLINK's capital budget through the Department of Higher Education.

OhioLINK's library services platform upgrade will position our member libraries to support 21st century teaching, learning, and research, streamline day-to-day operations, as well as enhance stability and security. The new cloud-based, multi-tenant structure also will enable OhioLINK to provide more direct support for member libraries in such areas as systems and e-resources.

The consortium will go live together in mid-2025. OhioLINK and Ex Libris are collaborating on the consortial implementation plan. The implementation will proceed in four phases: Onboarding; Vanguard; Main Implementation; and Post Implementation. Relevant information about the now complete RFP and further detail on the implementation process can be found on the [Ostaff LSP page](#), which will be updated as information becomes available.

[OhioLINK Central Catalog](#)

The holdings of all OhioLINK member libraries are listed in one shared central catalog, as well as consortially shared e-resources. The Central Catalog is formed out of contributions of bibliographic and item records from [the](#) local library catalogs that represent our members. Each local library system is linked in real time to the Central Catalog so that each time a record is updated in the local library system, it automatically updates the corresponding record in the Central Catalog. This includes updates to the bibliographic data, as well as updates to the status information for each item attached to a bibliographic record. The system of the Central Catalog linked to all local library systems is called INN-Reach and was developed specifically for OhioLINK by the library software vendor Innovative Interfaces, Inc.

Current library holdings in OhioLINK member libraries:

Titles (distinct works): approximately 10.6 million
Titles held in one library only: 6.2 million

SearchOhio

In the spring of 2011, OhioLINK decided to expand its resource sharing across the state to include the public libraries participating in the SearchOhio consortium. This expansion was possible because SearchOhio operates under the same software infrastructure as OhioLINK. The software vendor, Innovative Interfaces, worked with the two consortia to build a link between the two central catalogs. Thus, SearchOhio patrons can easily request OhioLINK materials and OhioLINK patrons can easily request SearchOhio materials. The SearchOhio partnership allows patrons at both these public libraries and academic libraries in Ohio to access a greater store of information than either would on their own. This partnership will continue to be supported after the LSP migration.

Depositories

Five regional book depositories were created after a 1987 report by the Library Study Committee recognized that the 14 public universities in the state were experiencing a severe library space problem. This report, mandated by the Ohio Department of Higher Education (formerly the Ohio Board of Regents), recommended that “the state of Ohio restrict construction of traditional academic library space and require public universities to explore and pursue solutions to library space problems other than the construction of conventional library buildings.” From this recommendation, a plan was developed to build high-density storage spaces in either local or regional configurations. Continued maintenance and governance of these facilities is accomplished through the Regional Depository Library program (under ODHE) and the Regional Depository Governing Council.

While only the participating public university libraries store items in the depository system, all items marked as circulatable are available via PCIRC. A list of the depositories is included below:

Northeastern Ohio Cooperative Regional Library Depository

Capacity: 1.8 million volumes

Serves: University of Akron, Cleveland State, NEOMED, Kent State, Youngstown State

Northwest Ohio Regional Depository

Capacity: 1.8 million volumes

Serves: Bowling Green State University, University of Toledo

Ohio State University Book Depository

Capacity: 3 million volumes

Serves: The Ohio State University

Southeast Ohio Regional Depository

Capacity: 750,000 volumes

Serves: Ohio University

Southwest Ohio Regional Depository

Capacity: 2.5 million volumes

Serves: Miami University, University of Cincinnati, Wright State University, Central State University

Electronic Resources

Electronic Journal Center (EJC)

The EJC offers more than 12,000 journals with more than 39 million articles. OhioLINK has “dual access” to most journals; meaning that metadata and articles are loaded to the locally developed and hosted Electronic Journal Center and are also available via the publisher platforms.

Electronic Book Center (EBC)

OhioLINK users have access to more than 200,000 e-books available via the Electronic Book Center and publisher platforms.

Research Databases

Users have access to more than 100 research databases provided through OhioLINK, in addition to whatever is subscribed to locally on their campus.

EBSCO Discovery Services (EDS or Discovery Layer)

The Discovery Layer provides a single, general search environment for all types of content in local integrated library systems, institutional repositories, OhioLINK services (EJC, EBC, ETD, DRC), consortially supplied databases and locally subscribed databases for each individual OhioLINK institution. Discovery Layer participation is optional for each member; 66 members are now participating.

Full Text Finder

OhioLINK also contracts with EBSCO to provide Full Text Finder (formerly known as Link Source), a link resolver and a list of electronic e-journals and e-books. Whether a library uses EBSCO’s discovery service or another vendor, Full Text Finder provides links to full text content. OhioLINK currently centrally covers the cost of Full Text Finder, and it is independent of a library’s decision to implement EDS.

Electronic Theses and Dissertations Center (ETD Center)

The ETD Center is the repository for Masters and Doctoral theses and dissertations in Ohio. This unique material is generated by graduate students and honors undergraduates at Ohio universities and provided as open access content freely available on the Internet. Nearly all 118,000 submissions are available as full-text PDF files. Graduate programs at 35 universities use the ETD Center to publish content. Since 2000, the ETD Center has provided ETD publishing options to any OhioLINK member school at no charge to the school. The ETD Council, OhioLINK, and ETD Center members jointly determine development and future directions of the ETD Center service.

[Music Center](#)

The Music Center contains 81,000 tracks of purchased music essential to academic music programs, available in a streaming format for students and faculty to access online at their convenience.

[Finding Aid Repository](#)

The EAD Finding Aid Repository allows researchers to locate archival materials and primary sources across the state by searching finding aids from participating institutions.

Affordable Learning Initiatives

[Affordable Learning Ohio](#)

Affordable Learning Ohio is OhioLINK's series of initiatives to lower the cost of college for Ohio higher education students by assisting our member libraries and campuses in identifying strategies for Open and Affordable Learning textbook and course material adoption, and helping locate statewide shareable library materials as well as [open educational resources](#) that are no cost or lower cost to students.

[eTutoring Program](#)

eTutoring is a collaborative effort between Ohio's two- and four-year institutions. Participating institutions have a signed agreement with OhioLINK, appoint a campus coordinator to serve as a liaison between the local learning center and the eTutoring program, and provide tutors for the shared pool of tutors. The collective pool of tutors offers a weekly schedule of online drop-in eTutoring sessions in a variety of subjects and a writing assignment review service. The program is particularly useful for students who are unable or unwilling to utilize the support available at in-person learning centers.

Electronic Resource Purchasing Models

OhioLINK has been involved in acquiring electronic content on behalf of members for a long time, including eBooks, e-journals, electronic databases, and other kinds of content. Most is paid by some combination of library and central funding. See below for more information about funding models.

OhioLINK Shared Collections Principles

The following collection development principles were presented by CIRM to LAC and approved on 9/11/2015:

These broad principles guide the selection of electronic content that is shared among all OhioLINK members:

- Content meets statewide strategic and sustainable priorities for teaching, learning, and research
- Decisions about and support for content are made by the member organizations
- There is a high need across the majority of the membership (basic resources)
- There is a firm commitment of sufficient funds from the membership (basic resources) or the research-intensive members (research resources)
- Price savings are substantially better than individual institutional purchases or subscriptions
- Management of the content supports efficiencies for staffing at OhioLINK and membership institutions

Content Categories

All OhioLINK (Core)

Core resources have been identified by CIRM as essential to OhioLINK members' information needs. Each institution contributes funds to pay for the resource. The formula to determine the cost to each institution varies by resource. Current practice for cost distribution is that CIRM advises on and reviews the cost distribution at the time that it goes to vote. CIRM representatives communicate about resource decisions and cost distributions with their constituents.

NPR

Model named after "National Public Radio." In this model, those institutions that are most interested in a resource pledge to make contributions to the purchase. If the total pledged funds are sufficient, the resource is made available to the entire community. Contributing institutions are still likely paying significantly less than they would outside of an OhioLINK deal.

Opt-in

In an Opt-in deal, only those institutions that pay will have access. Often this model works for more specialized resources in which there is not enough interest to rise to the level of an NPR. Opt-in resources are renewed on either a fiscal or calendar year with corresponding annual "open enrollment" periods.

Purchasing info by Resource Type

See the [E-Resource Information Pages](#) on Ostaff for information about current OhioLINK content packages:

The [Member Portal](#) has specific information about which e-resources your library subscribes to via OhioLINK, their cost to your library, and contracts.

Databases

OhioLINK categorizes databases as collections of records about books, journal articles, or other content, sold in sets. They may be very general, such as EBSCO's Academic Search Complete, or subject-specific, such as PsycInfo or the ATLA Religion Database. They may often include abstracts (summaries of articles) and/or full articles, book chapters, videos, music clips or images.

Generally, database subscriptions are run on a fiscal year basis (July 1 through June 30).

Most databases are run on a subscription basis with no post-cancellation access. See the [E-Resource Information Pages on Ostaff](#) for details about specific content packages:

In addition to OhioLINK-brokered databases, others are acquired as part of the Libraries Connect Ohio partnership. (See below for more information on LCO)

Electronic Journals

OhioLINK acquires a number of packages of electronic journals. In general, these are licensed directly from the publishers.

OhioLINK's current electronic journals portfolio includes 13 publishers, the largest of which are Elsevier, Springer, and Wiley.

Electronic journal content is traditionally acquired on a calendar year basis.

Electronic journals tend to have post-cancellation rights for the years paid for. However, additional access to backfile content may be available while OhioLINK has a current contract with the publisher. In some cases, OhioLINK has made one-time purchases of backfile content with post-cancellation access rights as well.

See the [E-Resource Information Pages on Ostaff](#) for details of specific packages:

OhioLINK has in many cases sought to "locally load" journal content, providing it from OhioLINK servers through the EJC. This preserves access and ownership. When OhioLINK has a current e-journal deal with a publisher in place, patrons also have access to the same content from content provider websites.

Electronic Books

OhioLINK also provides access to electronic books. The majority of content is from Springer, Wiley, and Oxford. In 2020 OhioLINK added Cambridge e-books to its shared e-resources via an Evidence Based Acquisitions (EBA) model. Electronic books may be locally loaded into the EBC or available via a vendor platform, depending on the package.

See the [E-Resource Information Pages on Ostaff](#) for details of specific packages:

Multimedia files

Over 81,000 classical music tracks from Naxos have been locally loaded and are accessible at the OhioLINK Music Center.

GEER-funded e-resources

The Governor's Emergency Education Relief (GEER) funds were part of the Coronavirus Aid, Relief and Economic Security (CARES) Act, federal economic aid authorized in response to the COVID-19 pandemic. In late 2020, OhioLINK was awarded \$2.5 million in GEER funds through the Ohio Department of Higher Education to help member institutions bridge gaps in instructional materials and library resources created by the urgent response to COVID-19. Access to these resources started in January 2021. OhioLINK was awarded additional GEER funding in 2022.

Some of the GEER-funded resources are purchases with perpetual access rights and some are subscriptions with access ending after 1 or 2 years. You can find the full details for GEER-funded resources on the [GEER Resources 2022](#) and [GEER Resources 2021](#) Ostaff pages.

Financial Overview

Fiscal Agent

1991-2013: Wright State University

2013-Present: Ohio State University

Funding types

Funds are provided through the State of Ohio biennium budget process, included as a line item within the Ohio Department of Higher Education budget. OhioLINK expends its resources in three broad categories: administration, content delivery and database licensing, and support functions, including the Central Catalog and OH-TECH/Shared Infrastructure for system support.

Operating Funds

Operating funds are used for operational costs such as staffing, software, and technology costs. A portion of some electronic resource costs are currently being funded by OhioLINK's operating budget, as well as the cost of the courier. The operating allocation to OhioLINK has been near \$6 million annually in recent years.

Capital Funds

Funds provided through the State Capital Bill. Capital funding is contributed to purchased content. Historically capital funds have been used to fund part of the electronic journal collections. The capital allocation to OhioLINK has been near \$7 million annually in recent years.

Member Funds

Funds paid by member institutions for electronic content access. These dollars are provided to support the purchase and subscription of shared electronic resources.

OhioLINK's member institutions provide the vast majority of resources supporting content purchases. Library funds provide around 80% of the amount needed to subscribe to these shared electronic resources.

OhioLINK receives the library funds through an annual invoicing process that bills each institution for the content we have agreed to support.

Historically, the funding formulas used to generate the costs for the libraries are based primarily upon their previous print history. In 2012, the LAC proposed a new funding formula for the Electronic Journal Center, which was approved by the OhioLINK Advisory Board in August 2012. This new formula is based partly on previous historical spend and partly on usage. This new formula was to be phased in over two years, but in 2014 the new formula process was frozen as the needed data gathering could not be done – many publishers do not provide this data.

OhioLINK launched a project in 2016 with the Clarke & Company consulting firm to develop a framework for a sustainable funding and allocation model for purchasing collections of electronic books (eBooks) that:

- Accounted for the variation in size, needs, and mission among OhioLINK member institutions.
- Respected the OhioLINK collection development and funding principles.
- Is relevant, equitable, transparent, predictable, and based on objective measures.

In September 2017, on recommendation from CIRM, LAC voted to approve the new eBook funding model. Pre-2017 e-book packages were not re-priced with the 2017 formula.

LSTA Funds / Libraries Connect Ohio Partnership

Federal Library Services and Technology Act (LSTA) funds through the State Library of Ohio provide electronic content access for OhioLINK, the Ohio Public Library Information Network (OPLIN) and the Information Network for Ohio's Schools (INFOhio).

Libraries Connect Ohio (LCO) partners OhioLINK, OPLIN and INFOhio receive funding to support a core collection of database resources for all citizens of the state.

Each organization provides ongoing support to its members to make use of the resources. OhioLINK administers the fiscal portion of the grant on behalf of LCO.

The LCO deal runs for five fiscal years. The most recent term runs from July 1, 2023 to June 30, 2028. Content selection is the result of a competitive bid process; proposals were evaluated and selected by librarian stakeholder groups from academic, public, and school libraries.

Member Portal

The Member Portal is a tool for members to view information about their library on file with OhioLINK. All OhioLINK library directors have access to the Member Portal and can view the following information:

- Institution information such as OhioLINK team participants, library contact information, and IP addresses
- Your library's signed Memorandum of Understanding (MOU) with OhioLINK
- Which OhioLINK e-resources your institution subscribes to and their cost
- E-resource contract documents
- Electronic Journal Center statistics, including COUNTER usage reports and the current holdings report
- Legacy system usage statistics and Music Center usage statistics

Accessing the Member Portal

Members of most OhioLINK policy and implementation teams have access to the [Member Portal](#). Directors, CIRM, and ERIT members have the Executive permission level, with the ability to view all institution information, including e-resource contract documents. Other OhioLINK policy and implementation team members (Lead Implementers, DIAD, and ICS) are able to view institution information except for contract documents. All Ostaff users are able to view usage reports for the EJC and Music Center.

Directors, CIRM members, and ERIT members are able to nominate other staff at their libraries who need access to Member Portal by contacting [OhioLINK Support](#).

Member Portal access is view only. To make updates to your library's information in Member Portal, contact [OhioLINK Support](#).

To learn how to use the Member Portal, you may watch a recorded [orientation webinar](#) from November 2019. (This requires a login with your Ostaff password).

Appendices

Appendix 1: OhioLINK Contact Information

OhioLINK
1224 Kinnear Road
Columbus, OH 43212
Office phone: 614-485-6722
Email: info@ohiolink.edu

[OhioLINK Website](#)

[Ostaff Website](#)

[OhioLINK Technical Support](#) or [email us](#).

[OhioLINK Staff Directory](#)

Amy Pawlowski, Executive Director
apawlowski@ohiolink.edu / (614) 485-6723

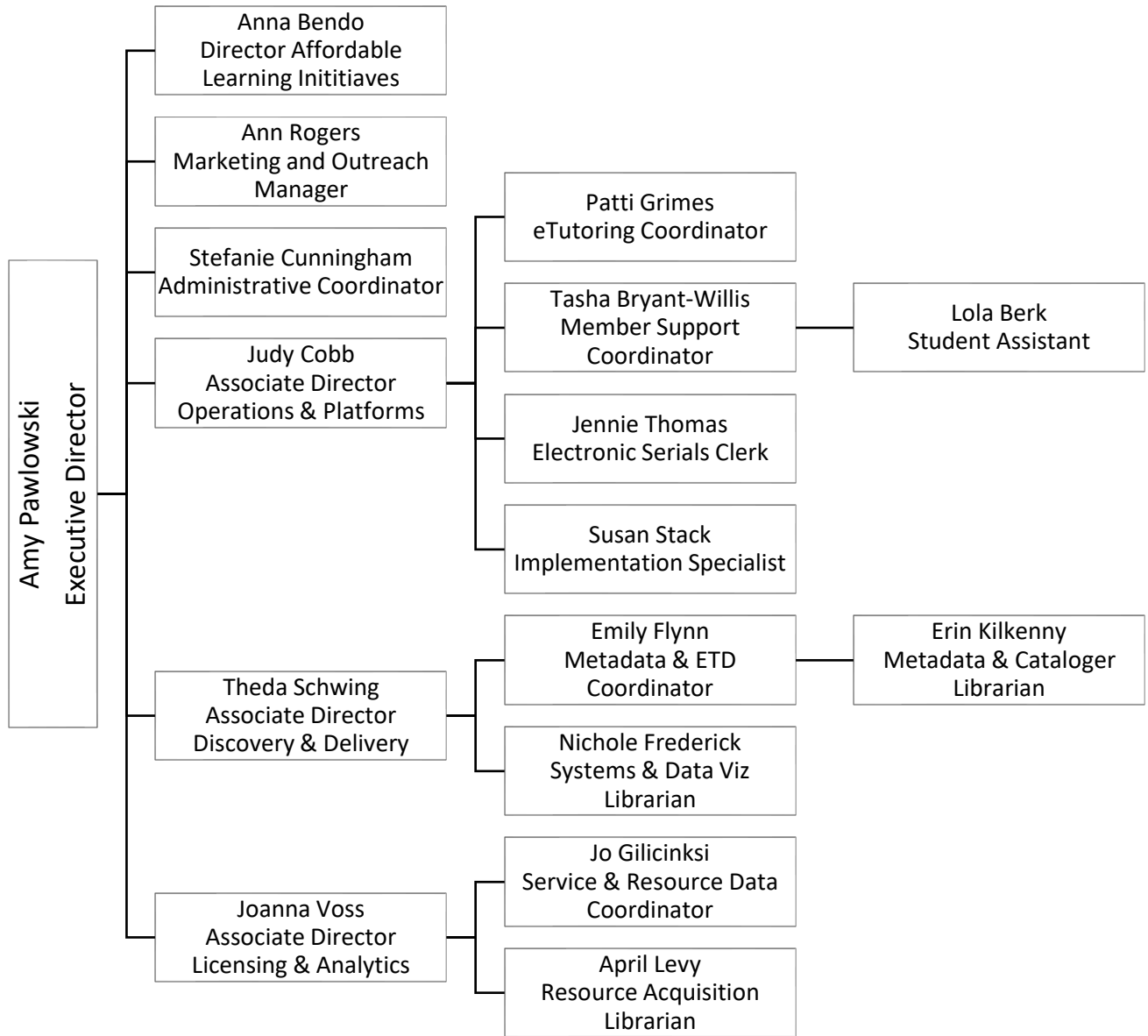
Judy Cobb, Associate Director of Operations and Platforms
<mailto:jcobb@ohiolink.edu> / (614) 485-6754

Theda Schwing, Associate Director of Discovery and Delivery
tschwing@ohiolink.edu / (614) 485-6752

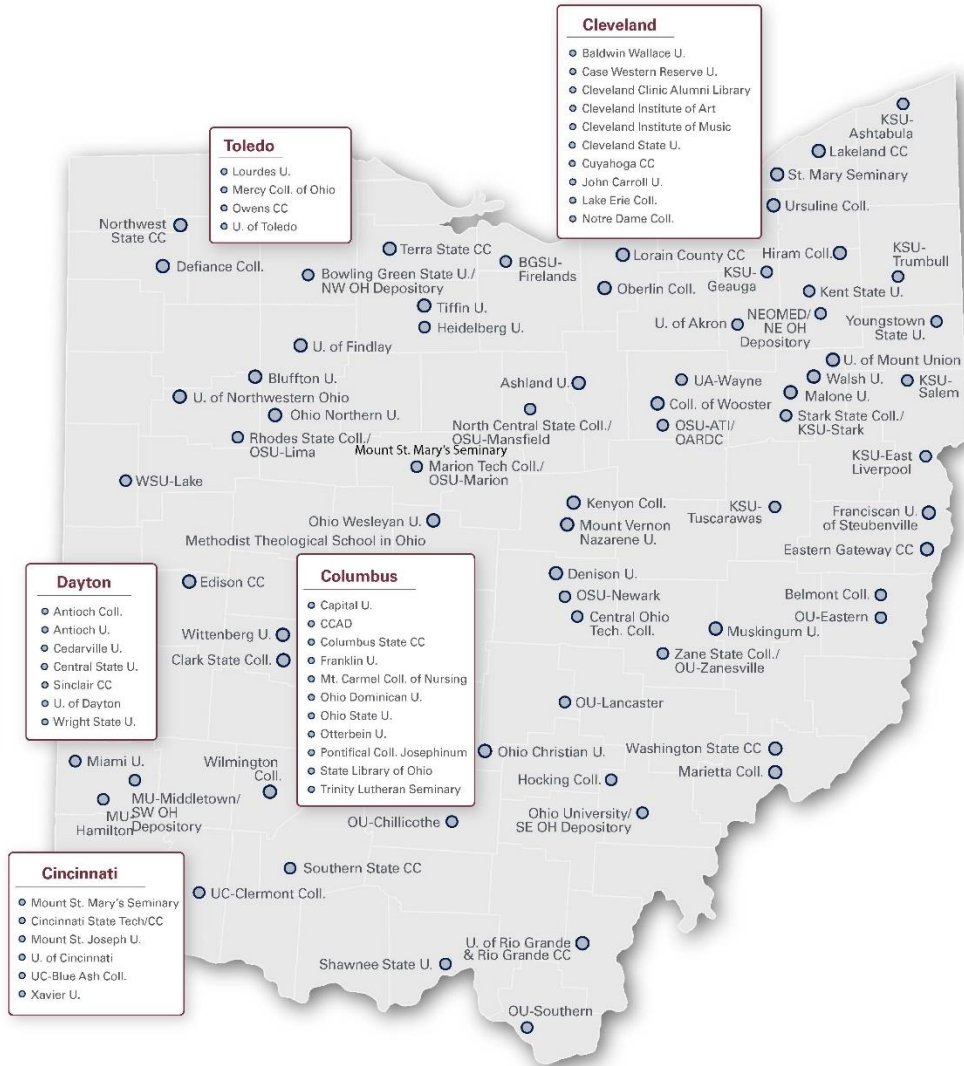
Joanna Voss, Associate Director of Licensing and Analytics
jvoss@ohiolink.edu / (614) 485-6729

Tasha Bryant-Willis, Member Support
tbryantwillis@ohiolink.edu / (614) 485-6727

Appendix 2: OhioLINK Organizational Chart



Appendix 3: [OhioLINK Map](#)



Appendix 3: Communications and Information for Directors

E-mail

- Directors-only listserv messages – OhioLINK list communications are intended to provide important information about OhioLINK meetings, requests for input or actions, changes to resources or services, and relevant financial information. We will sometimes cc the directors list on wider communication, so you are aware that certain messages were shared with your staff.
- Weekly Updates – a brief, easily scannable OhioLINK news update sent Monday end-of-day to the general OhioLINK listserv. [Sign up](#) for the OhioLINK general list yourself or ask for assistance via support@ohiolink.edu.

Ostaff

OhioLINK maintains a password-protected extranet that offers detailed information about its rosters, resources, and services, including non-protected information specifically for faculty.

- [Directors' page](#) – a quick view of upcoming meetings and communications to assist directors in talking with their administrators. Quarterly Talking Points are intended as an aide for directors' updates for campus administrators. These are distributed at each of the Directors' meetings.
- [Member Portal](#) - institution-specific information about contracts, fees, and resource usage for directors and OhioLINK policy and implementation team members only. See Page 22 of this Briefing Book for more information.

Meetings

Quarterly Meetings– You will receive invitations and agendas for March, June, September, and December meetings, which run about 3-4 hours.

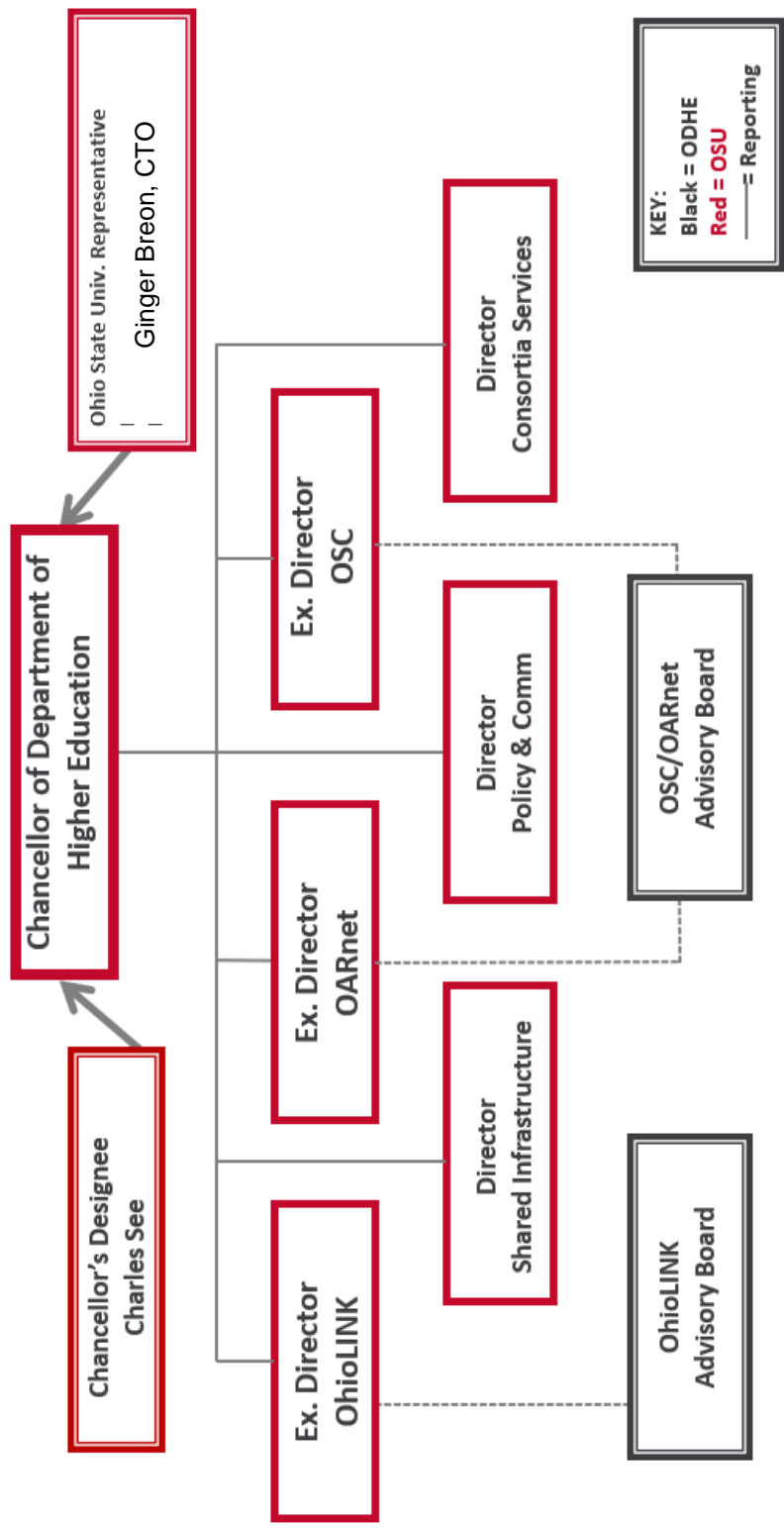
Directors Open Discussions – online monthly, unstructured but moderated professional conversation with other library directors across the state.

Publication

[Fiscal Year Membership Report](#) – a brief overview of major accomplishments. While not director-specific, this does offer a concise look at major efforts and consortium metrics.

Appendix 4: OH-TECH Organizational Chart

TABLE OF ORGANIZATION



Appendix 5: List of Abbreviations and Acronyms Used by OhioLINK

ACCIT – The Accessibility Implementation Team (ACCIT) acts on digital accessibility remediation and support requests in conjunction with appropriate local staff and the OhioLINK central office to ensure that OhioLINK’s shared e-resources are available to all. The Team is also responsible for communicating information about accessibility as it relates to OhioLINK shared collections and services to relevant local staff.

Central Catalog – The OhioLINK Library Catalog, the central or union catalog for all OhioLINK member library systems. Often referred to as simply “Central,” there are two interfaces available: “Encore” and “Classic.”

Classic Catalog One of two possible interfaces for the Central Catalog. The Classic Catalog user interface is similar to a traditional web library catalog.

CIRM – Cooperative Information Resources Management Policy Team – Explores and makes recommendations to the Library Advisory Council on new databases and publishers that OhioLINK should consider acquiring. Focuses on cooperative resource management issues and recommends new policies and procedures. Consists primarily of collection development and acquisitions librarians.

CONSORT Colleges – Four independent colleges that have shared presence in Central through their shared CONSORT online catalog. CONSORT members: Denison University, Kenyon College, Ohio Wesleyan University, and College of Wooster.

DIAD – Database Improvement and Discoverability Policy Team - Focuses on metadata as it relates to integration between shared systems and local systems, authority work, database integrity and impact of displays and searching of metadata on end users in shared or integrated systems. Responsible, as appropriate, for evaluating OhioLINK central and contributing ILS/LMS systems as they relate to managing shared metadata.

DMS – DMSC – Database Management and Standards Committee – Replaced in 2018 by DIAD. Maintains quality standards for the central catalog. Creates policies and procedures concerning all metadata for all members to follow. Consists primarily of cataloging and technical services librarians.

e-Book – Book in electronic form, usually available on the Web in HTML or PDF format.

E-journal – Electronic journal, usually available on the Web in PDF format.

EBC – Electronic Book Center – OhioLINK’s content platform hosting a set of eBooks from multiple publishers.

EBSCO – EBSCO Publishing, database producer and full-text provider; delivers databases for OhioLINK, INFOhio and OPLIN.

EDS – EBSCO Discovery Service – EBSCO’s Discovery Layer product implemented by many OhioLINK libraries.

EJC – Electronic Journal Center – OhioLINK’s content platform hosting a set of e-journals from

Encore – One of two possible interfaces for the Central Catalog. The Encore interface is similar to other library discovery interfaces such as EDS or Summon. The other interface is referred to as “Classic.”

Electronic Resource Implementation Team (ERIT) – New implementation team instated in 2018. The group is charged to act on decisions made by CIRM in terms of packages, titles, etc. and to respond to CIRM and OhioLINK requests for data (usage, budget, title lists, etc.) to support negotiations and shared resource analysis.

ETD Center – Electronic Theses & Dissertations Center – A growing database of doctoral theses and dissertations from Ohio colleges and universities.

Finding Aid Repository – Sometimes referred to as the FAR or EAD, the OhioLINK Finding Aid Repository is designed to showcase the rich collections housed in archives, libraries, and other institutions throughout the state of Ohio. The Repository provides access to collections on a broad scale, increasing the visibility of these unique and valuable resources for research.

Full Text Finder – A link resolver from EBSCO, formerly known as Link Source.

GOBI – Now both the name of the service as well as the name of the company formerly known as YBP. It is a vendor service for libraries to acquire print books and e-books.

ICS – Intercampus Services Policy Team (previously the Intercampus Services Committee) – Recommends policies and procedures for statewide resource sharing. Coordinates operations among local sites and between local/central site. Oversees document delivery systems. Consists of circulation and interlibrary-loan staff.

III – Innovative Interfaces, Inc. – The company that produces and supports the INNOPAC, Millennium and INN-Reach software used for OhioLINK central and local library systems. Also referred to as just “Innovative.”

Inclusive Access – Model of providing textbooks in which students are billed for an electronic version of the text through their bursar’s office at a fraction of list price. The model allows for wide access to textbooks at lower cost to students.

INFOhio – Information network for Ohio’s K-12 schools.

INN-Reach – The INNOPAC and Millennium software components that support the OhioLINK consortium catalog (Central) and PCIRC lending and borrowing.

LAC – Library Advisory Council – Reviews and approves all policies for carrying out the OhioLINK program as proposed by the three policy teams. Discusses and approves major funding measures. Participates in strategic planning. Consists of library directors from all public universities, two private universities and representatives from independent and two-year colleges.

LACCC – Library Advisory Council Coordinating Committee – This committee consists of six library directors and is charged with providing general oversight, screening and review of committee work and activities on behalf of LAC.

LCO - Libraries Connect Ohio is a joint initiative of OhioLINK, OPLIN, INFOhio and the State Library of Ohio to maximize the availability of common information resources to the patrons of all three communities. The primary activity is joint database licensing.

Link Source – A link resolver from EBSCO, now known as Full Text Finder.

Link Resolver – Software used by libraries that takes a user from a citation in one database to full text in another.

Member Portal – An [online tool](#) for members to view information about their library on file with OhioLINK, such as OhioLINK team participants, IP addresses, and e-resource subscriptions.

Millennium – Integrated library system software from Innovative Interfaces, Inc., used by OhioLINK and some member libraries. Millennium has been succeeded by Sierra as Innovative Interfaces' ILS.

Minimal record input standards – Minimal standards for records submitted to Central.

NPR Model –“National Public Radio” model in which those who are most interested in a resource pledge contribution to make the resource available for all OhioLINK members. If the total pledged funds are sufficient, the resource is made available to the entire community.

OARnet – Ohio Academic Resources Network – A member of OH-TECH and funded by the Ohio Department of Higher Education; provides high-speed network access and other services for Ohio's higher education, K-12, health care and government communities.

OBR – Ohio Board of Regents – Former name for the body that governs higher education in Ohio, including OhioLINK. Also referred to as OBOR. In 2015, legislation passed to re-name the state government department that supports the Board of Regents to the Ohio Department of Higher Education, see ODHE.

OCLC – Online Computer Library Center Inc. – The library service organization that provides resources and support for libraries worldwide.

ODHE – Ohio Department of Higher Education - the body that governs higher education in Ohio, including OhioLINK. Formerly known as the Ohio Board of Regents, or OBR.

OER – Open Educational Resource – An open access textbook.

OETDA – Ohio Electronic Thesis and Dissertation Association - A non-profit association established in September 2006 by a network of interested ETD professionals in Ohio. Membership is open to persons responsible for, or interested in, Electronic Thesis and Dissertation (ETD).

OH-TECH - the Ohio Technology Consortium (OH-TECH) functions as an umbrella organization for Ohio's statewide technology infrastructure, the Ohio Academic Resources Network (OARnet), the Ohio Supercomputer Center (OSC) and OhioLINK. Funded by the Ohio General Assembly through the Ohio Department of Higher Education, OH-TECH reports to the Chancellor of the Ohio Department of Higher Education. All business and legal services are provided by The Ohio State University, with direction from the CIO.

Office Catalog – Formerly known as the Serials catalog. This catalog is used in the OhioLINK offices for cataloging OhioLINK-provided e-resources and for managing content and claims for the EJC using the III serials claiming module.

OhioLINK – The Ohio Library and Information Network – A consortium of Ohio college and university libraries and the State Library of Ohio that work together to provide Ohio students, faculty, and researchers with the information they need for teaching and research.

OHIONET – A library service organization for Ohio libraries.

OPAL –Ohio Private Academic Libraries - A group of independent colleges that have shared presence in Central through their shared OPAL online catalog, which is administered by OHIONET.

OPLIN – Ohio Public Library Information Network – Supplies Internet access and online resources for public libraries in the state of Ohio.

Opt-In – Refers to online resources for which consortial pricing is negotiated by OhioLINK, and those who do not participate do not get access.

Ostaff – Web site for OhioLINK members. Most of the Ostaff pages require login via an Ostaff account.

Ostaff account – A username and password used to gain access to Ostaff and Member Portal.

PCIRC – Patron Initiated Circulation – OhioLINK direct borrowing and lending made possible by INN-Reach software.

Priority Dispatch – The courier service used for delivery of PCIRC materials.

Sierra – Integrated library system software from Innovative Interfaces, Inc., used by all member libraries. Sierra updated and replaced Millennium.

USO – University System of Ohio.

YBP – Yankee Book Peddler – Now known as GOBI – A book vendor for firm and approval orders. OhioLINK has an agreement with YBP for specific services and discounts for all member libraries, which are encouraged to use these to facilitate state-wide data gathering and cooperation.

Original glossary was excerpted from a glossary prepared by Margo Warner Curl, CONSORT Colleges, with input from many others. Latest revision, 2023.

Appendix 6: Strategic Framework

This [Strategic Framework](#) is a blueprint that will guide our future work. It provides high-level areas of focus which OhioLINK staff and member libraries will use to develop and prioritize the projects, goals, and objectives that move us toward our vision.

Our Strategic Directions

Lead Coordinated Shared Solutions

We work together to develop innovative and efficient solutions to best serve our communities.

Develop Strong Value Propositions

We analyze data and share the stories that demonstrate the value and impact of OhioLINK and of our libraries.

Advance Research, Learning and Scholarship

We develop and manage resources, services, and tools that support student success, research innovation and knowledge creation.

Engage Our Communities

We actively foster opportunities for meaningful engagement and knowledge exchange among members, community and professional partners, key stakeholders, and constituents.

Plan and Manage Resources Effectively

We steward resources responsibly to position the consortium for sustained change and growth.

Our Culture

Vision

OhioLINK is an innovative leader among library consortia, working collaboratively to deliver the resources and services Ohio students, faculty, and citizens need to achieve their academic goals and aspirations.

Commitment

OhioLINK staff and members approach our work with these principles embedded in everything we do:

- Equity, diversity, and inclusion as foundational elements of our work
- Accessibility and the elimination of access barriers
- Collaboration among staff, members, and partners
- Open and transparent communications

Values

Our core aspirational values guide and support our work and provide the foundation of our organizational relationships.

Empathy

We respect the diverse perspectives of our colleagues.

Integrity

We hold ourselves accountable for our work as trusted partners and leaders.

Service

We work together mindfully to develop simple and creative solutions to complex problems.

Curiosity

We are open to new ideas and new approaches to our work, always seeking to encourage and expand knowledge to move forward.

Balance

We find joy in our work together, remaining flexible, and demonstrating grace to each other and to ourselves

Appendix 7: Library Advisory Council Action Items Passed (Last 5 years)

Meeting/Vote Date(s)	Brief Description of Action Item
Vote took place via survey 9/1/2023 - 9/8/2023	Accept CIRM's recommendation for Elsevier e-journals hybrid OA offer
Vote took place 4/17/23 -4/26/2023	Accept CIRM's recommendation to renew EBSCO Expanded Pack for one year
Vote took place 3/13/2023 - 3/20/2023 via survey	Vote to approve the ICS recommended policy change to extend libraries' ability to apply their local fees/fines to items borrowed from both OhioLINK and SearchOhio institutions. This change will further simplify the fee/fine structures for both OhioLINK and SearchOhio libraries.
Vote took place 12/9/2022 - 12/26/2022 via survey	Vote to approve the DIAD recommended policy "Links in Member-Contributed Records in the Central Catalog"
Vote took place October 3, 2022 - October 14, 2022	Accept CIRM's recommendation to renew American Chemical Society (ACS) e-journals
Vote took place September 15, 2022 - September 28, 2022	Accept CIRM's recommendation for an IOP journals upgrade to all titles with unlimited OA publishing
Vote took place April 11, 2022 - April 18, 2022	Accept CIRM's recommendation for renewing EBSCO Expanded Pack for one year
3/11/2022	Vote to accept the Database Improvement and Discoverability (DIAD) policy team's recommendation to remove the alternative Subject Headings from OhioLINK shared e-resources MARC records that were approved by LAC in March 2021 and to use Library of Congress' updated terms per standard practice
February 2022. LAC vote took place 2/7 - 2/11/2022	Accept Wiley e-journals hybrid OA offer
9/10/2021	Accept CIRM's recommendation for a revised journals contract from Cambridge University Press.
3/12/2021	Accept DIAD's recommendation on adding alternative Subject Headings
3/12/2021	Accept LAC Project Team's OhioLINK Digital Accessibility Statement
3/12/2021	Accept LAC Project Team's recommendation that "OhioLINK institutions that participate in the ETD Center agree to make every effort to ensure that the documents submitted to the ETD Center meet their institution's minimum digital accessibility standard (MDAS) or, if there is no MDAS, the most recent industry standard."
3/12/2021	Accept LAC Project Team's recommendation for the creation of "a standing OhioLINK Accessibility Implementation Team to consist of one representative from each member library. The representatives will be the point person for accessibility related discussions, questions, shared work, and remediation requests."
9/11/2020	Accept ICS proposal (in after-meeting online voting) to allow some billed items to be renewed until Jan-21 by the patron's library.

Meeting/Vote Date(s)	Brief Description of Action Item
9/11/2020	Approved EBSCO Expanded Pack renewal for FY20-22
9/11/2020	Approved ICS recommendation that grouping features be enabled for the Central Catalog
9/11/2020	Approved CIRM's new content deals with 2020 (ACS Journals, Springer Journals, and Cambridge EBA
3/8/2019	Accept DIAD proposal to stop recontribution of all-OhioLINK e-resources to the Central Catalog.
12/12/2018	Accept ICS policy revision to allow libraries to match OhioLINK fines to existing local fine policy or to continue following the traditional fine structure.
6/8/2018	LACCC and OhioLINK Office will create a Steering Group for the strategic planning effort.
6/8/2018	Approved EBSCO Expanded pack renewal for FY 18-19

Appendix 8: Invoicing Guidelines

General Member Billing Information

- To be billed directly, an institution must have a signed Memorandum of Understanding (MOU) with OhioLINK
- OhioLINK staff determines member costs for resource and the billing is done by the OH-TECH Business Office
- Payment is due 30 days from date of invoice
- Past due amounts are always indicated on new invoices
- Invoices are created for each resource. Some resources may be combined on one invoice if provided by the same vendor
 - Invoices with multiple resources will be sent with an accompanying sheet (“second sheet”) listing each of the products and their individual prices
- OhioLINK will distribute a billing timeline to members no later than a month before the new fiscal year. The billing timeline functions as a guide and is informational in nature. Billing dates on the timeline may change. OhioLINK will convey any changes in the billing timeline to members
- Invoicing errors, institution address or contact updates, and questions about the timing of invoices should be directed to [Stefanie Cunningham](#)
 - Invoices with incorrect amounts or dates will be corrected and reissued within 5 business days

Appendix 9: OhioLINK Meetings and Communications Code of Conduct

OhioLINK Meetings and Communications Code of Conduct

- 1) OhioLINK members agree to behave in a collegial and professional fashion when engaged in Consortium Activities. Behavior such as "flaming" on discussion forums or overbearing attitudes on mailing lists and in meetings is considered inappropriate and unprofessional.
- 2) OhioLINK members appointed to serve as OhioLINK Committee Chairs or Co-Chairs are expected to actively conduct the business of their committees in a fair and impartial fashion.
- 3) OhioLINK Committee and Team work is expected to be managed as a formal work assignment, not as "extra" or "as time allows" or "volunteer" work. Member institutions should support OhioLINK assignments and adjust work assignments as appropriate.
- 4) OhioLINK Committee members are expected to actively participate in meetings and discussions as follows:
 - a) Insofar as possible, be punctual and plan to stay for the entire meeting.
 - b) Respect time limits for agenda items.
 - c) Be courteous, listen attentively, and be respectful of other points of view.
 - d) Participate fully in the group exchange, and do not engage in sideline conversations, cross talk, or distracting behaviors.
 - e) Be flexible and open to change and new ideas.
 - f) Stay on task and avoid diverting attention to other unrelated topics.
 - g) Assume positive intentions by others, giving them the benefit of doubt.
 - h) Be solution-focused, seeing opportunities, challenges, and possibilities without dwelling on past slights, roadblocks, or excuses.
- 5) While OhioLINK Committee members bring their own institution's perspective, needs, and priorities to meetings and discussions, OhioLINK decisions are based on what is best for the entire collective and the majority of participating libraries, not on personal or individual institutional agendas. Committee Members are expected to be able to discuss and evaluate proposals and actions from both the points of view.
- 6) Meeting materials distributed and discussed at OhioLINK Committee meetings often reflect work in progress, negotiations in progress, and drafts of announcements, papers, questionnaires, etc. As such, Committee members should use caution and discretion when communicating or distributing information based on them. Please contact the OhioLINK Central Office if you need updated or final information for presentations and communications.

Violations of the Code of Conduct on the part of an individual may ultimately result in the individual being asked to leave a meeting and/or be suspended from some or all Consortium activities; or the Member being asked to remove the individual from further involvement in OhioLINK activities.

Passed by LAC July 2018

Appendix 10 OhioLINK Consortia Accessibility Statement

About OhioLINK

The Ohio Library and Information Network (OhioLINK) is a consortium of Ohio's college and university libraries and the State Library of Ohio. Serving more than 800,000 students, faculty, and staff at 88 institutions with 117 libraries, OhioLINK's membership includes 16 public universities, 23 community/technical colleges, 48 private colleges and the State Library of Ohio. OhioLINK serves faculty, students, staff, and other researchers via campus-based integrated library systems, the OhioLINK central site, and shared electronic resources.

The business and administration of the consortium is administered by the OhioLINK Central Office. The Ohio State University (OSU) acts as the administrative home for the OhioLINK Central Office and as such, the OhioLINK Central Office will adhere to [OSU's policies and procedures for digital accessibility](#).

OhioLINK Collections and Content

OhioLINK provides access to a shared library collection consisting of over 35 million items held on over 40 platforms.

The OhioLINK Central Office creates and provides content to its membership and the general public via the use of its web site, extranet site (OStaff), and various documents, videos, and data created for members to use in their work.

OhioLINK is committed to the ongoing improvement of inclusivity and accessibility of its shared collections and materials created by the Central Office.

Measures to support accessibility

OhioLINK takes the following measures to ensure accessibility of shared e-resources:

- Designate a coordinator who is responsible for the OhioLINK Central Office's internal accessibility requirements and efforts
- Use internal policies in the Central Office to ensure OhioLINK content is as accessible as possible today and to reflect our commitment to continuous improvement
- Implement procurement processes that prioritize accessible products and services
- Provide regular accessibility training for OhioLINK Central Office staff
- Employ formal accessibility quality assurance methods
- Establish and maintain a standing OhioLINK accessibility implementation team
- Negotiate and maintain license agreements that maximize accessibility and address remediation
- Engage with vendors to improve and maintain product accessibility for all users and the creation of digital-born accessible products that meet or exceed industry standards and best practices
- Advocate for accessibility and inclusion among OhioLINK members, vendors and business partners, and the broader library community

Conformance status

The [Web Content Accessibility Guidelines \(WCAG\)](#) define requirements for designers and developers to improve accessibility for people with disabilities. It defines three levels of conformance: Level A, Level AA, and Level AAA.

OhioLINK will conform to the Ohio State University's Minimum Digital Accessibility Standards (MDAS) policy and use the procedures and workflows OSU provides.

The OhioLINK Central Office is actively working to assess the conformance status of all local and vendor platforms. Over time, the OhioLINK Central Office will extend this section of the OhioLINK Digital Accessibility Statement to include a list of platforms and their accessibility status. This may include, but is not limited to, the following data for each resource:

- Assessment method used
- "Quick test" status and date(s)
- Full manual test results and date(s)
- Future roadmap for achieving compliance with the OSU MDAS (or higher)

Feedback

We welcome your feedback on the accessibility of OhioLINK resources. OhioLINK members have a shared responsibility in the accessibility and remediation of OhioLINK shared e-resources. Please let us know if you encounter accessibility barriers by emailing us at accessibility@oh-tech.org.

The OhioLINK Central office will respond to messages sent to accessibility@oh-tech.org within two business days and will coordinate necessary follow-up actions with the appropriate member library.

Review

The statement was reviewed and approved by the OhioLINK Library Advisory Committee (LAC) on March 19, 2021

The OhioLINK LAC will review this statement every 5 years.

Appendix 11: Sample Memorandum of Understanding

CONSORTIUM AGREEMENT

OhioLINK Membership and Services

This Consortium Agreement (“Agreement”) is entered into by and among The Ohio State University as Fiscal Agent for the Ohio Library Information Network (“OhioLINK”) and the undersigned Members set forth on the signature pages hereto, dated as of this _____ day of _____, 2014 (the “Effective Date”).

WHEREAS, OhioLINK is a consortium created by the Chancellor of the Ohio Board of Regents and pursuant to authority granted in Section 3333.04(T) of the Ohio Revised Code, as may be amended, to provide services and access to academic institutions of higher education and research throughout Ohio and to support and enhance the higher education library collections in the state of Ohio; and

WHEREAS, the Ohio Board of Regents has primary authority to set policies for OhioLINK and for OhioLINK’s relationship with Members and has appointed the OhioLINK Advisory Board, an eighteen member Board comprised of representatives of four-year colleges, community colleges, regional campuses, library deans or directors, a Chief Academic Officer representing the Fiscal Agent, ex-officio members representing OhioLINK, the Library Advisory Council (“LAC”) and the Ohio Board of Regents pursuant to Ohio Board of Regents Directive 2008-007, as amended. LAC serves as the primary advisory body to the OhioLINK Library Advisory Board and the Ohio Board of Regents or its designee. LAC consists of library deans and directors from each Charter Member, representative deans and directors from independent and two-year colleges, law libraries, medical libraries, and representatives from standing committees and task forces as constituted by LAC; and

WHEREAS, Member contributions have significantly helped to build the OhioLINK System and Core Services and fund the capital assets that comprise the OhioLINK Central Collection; and

WHEREAS, OhioLINK strives to make the information resources in the libraries of the Members more widely available and accessible in order to enhance the economic and educational development of the citizens of Ohio and to reinforce Ohio as a leader in the delivery of information services; and

WHEREAS, Members may voluntarily join OhioLINK and take advantage of OhioLINK services by becoming a party to this Agreement and agreeing to abide by the conditions hereof; and

WHEREAS, Subject to approval by the Ohio Board of Regents, Members may designate other organizations to participate in this Agreement as Affiliates which are identified by each Member on Appendix A to its respective signature page; and

WHEREAS, Members' support and commitment to OhioLINK allow OhioLINK to provide comprehensive services and negotiate favorable contracts for materials and services on behalf of all Members and maintain services on a long-term basis; and

WHEREAS, each Member acknowledges that it seeks to participate in OhioLINK, is eligible to do so, and wishes to contribute to and benefit from OhioLINK services; and

WHEREAS, The Ohio State University currently serves as the fiscal agent for OhioLINK ("Fiscal Agent") and is responsible for depositing and maintaining fees, paying vendors, and performing financial duties for OhioLINK; and

WHEREAS, OhioLINK, Fiscal Agent, and Members (individually, a "Party" and collectively, the "Parties") desire to support cooperative electronic and physical document delivery and sharing of materials held by Members or by OhioLINK on behalf of its Members,

NOW THEREFORE, in consideration of the mutual promises set forth herein, the Parties agree as follows:

I. DEFINITIONS

1.1 **"Affiliate"** means any organization that:

- a) is not eligible to become a Member pursuant to this Agreement; and
- b) Member wishes to allow said Affiliate to have access to the services available under this Agreement; and
- c) has been approved as an Affiliate by the Ohio Board of Regents; and
- d) Member agrees to manage and be fully responsible for said Affiliate's participation in OhioLINK and compliance with this Agreement.

1.2 **"Charter Members"** means the original OhioLINK members as defined by the Board of Regents at the creation of OhioLINK. Charter Members are the State Library of Ohio,

Bowling Green State University, Central State University, Cleveland State University, Kent State University, Miami University, The Ohio State University, Ohio University, Shawnee State University, University of Akron, University of Cincinnati, University of Toledo, Wright State University, Youngstown State University, Northeast Ohio Medical University (NEOMED), Case Western Reserve University, and the University of Dayton.

- 1.3 “**Core Services**” means the mechanism provided and maintained by OhioLINK to facilitate the sharing and distribution of Library Materials and access to Library Materials to all Members at the established annual fee and usage charges and as further described in this Agreement.
- 1.4 “**Fiscal Year**” means the twelve-month period commencing on July 1st and ending on June 30th.
- 1.5 “**Library Materials**” means the OhioLINK Central Collection and the Local Shared Collection. Library Materials may include physical and electronic materials in any format, but does not include laptops and other devices or objects that are circulated from the Member library merely as a point of convenience, reserve items, or items that have special limited circulation rules that also apply to the patrons of Member.
- 1.6 “**Local Shared Collection**” means those materials in any format that:
- a) are purchased and/or licensed by Member;
 - b) circulate to Member’s own users;
 - c) Member is legally authorized to make available to other Members as Library Materials; and
 - d) Member makes available to OhioLINK pursuant to this Agreement.
- 1.7 “**Meetings**” means regular gatherings for Members to discuss and decide policies, procedures, and content purchases for Core Services.
- 1.8 “**Members**” means all Charter Members, and certain not-for-profit libraries upon invitation by OhioLINK with the consent of the Ohio Board of Regents, as identified on the attached Appendix B, as may be amended from time to time.

Member may include any branches, regional campuses, libraries, or other entities which are owned or controlled by the Member for which the Member is legally obligated and which are eligible to be Members pursuant to the OhioLINK Charter or other governing documents.

- 1.9 “**OhioLINK Central Collection**” means all of the materials in any format which are purchased and/or licensed by OhioLINK and made available to all Members, which may be funded or subsidized in whole or in part by OhioLINK or the Members.
- 1.10 “**OhioLINK System**” means the technological infrastructure, including hardware, software and other related components, to centrally facilitate physical and electronic sharing of Library Materials and access between Members.
- 1.11 “**Opt-In Services**” means other locally maintained and controlled databases or services, which are neither Core Services nor the OhioLINK Central Collection but are available to Members as additional services within the OhioLINK resources to be purchased at each Member’s discretion.

II. OHIOLINK RESPONSIBILITIES

- 2.1 OhioLINK shall manage and support Core Services and make Core Services available to all Members as follows:
- a) OhioLINK shall negotiate pricing structures for the purchase and distribution of OhioLINK Central Collection; and
 - b) OhioLINK will provide Members with access to all Library Materials; and
 - c) OhioLINK will maintain and provide a union catalog of all Library Materials that are available which shall be accessible to Members; and
 - d) OhioLINK will be responsible for providing and maintaining the OhioLINK System that OhioLINK determines, in its sole discretion and as directed by LAC and the Ohio Board of Regents, is best suited to allow Members to access Library Materials; and
 - e) OhioLINK shall, in its sole discretion, determine the adequacy and sufficiency of the infrastructure required to participate in the OhioLINK System, and may specify certain vendors, software or other technical requirements which Member must use or comply with, as applicable, in order to receive Core Services; and
 - f) OhioLINK shall provide such other services as determined by Members to be necessary and supportive of OhioLINK’s mission and reasonably acceptable to OhioLINK, LAC and the Ohio Board of Regents.
- 2.2 OhioLINK, in its sole discretion, shall negotiate, maintain, and facilitate access to Opt-In Services and shall provide information about available Opt-In Services to all Members. OhioLINK may, in its sole discretion, add, discontinue, or develop cost-recovery mechanisms for Opt-In Services, as appropriate and consistent with applicable agreements between OhioLINK and Opt-In resource providers.
- 2.3 OhioLINK shall maintain on file a fully executed copy of this Agreement, including all executed signature pages and a record of any terminations pursuant to Article VI of this Agreement. OhioLINK shall maintain all Member signature pages executed subsequent to the Effective Date and shall promptly revise Appendix B to reflect a current list of all

Members. OhioLINK shall provide a copy of any new Member signature pages and a revised Appendix B to Fiscal Agent promptly after any execution or amendment, as the case may be.

- 2.4 OhioLINK shall facilitate and host regular Meetings for Members and shall provide reasonable notice of Meetings to all Members.
- 2.5 OhioLINK shall be primarily responsible for monitoring and enforcement of compliance with this Agreement by all Members.
- 2.6 OhioLINK shall collect fees from all Members and promptly remit such fees to Fiscal Agent. OhioLINK shall also remit all invoices from vendors to Fiscal Agent promptly for payment.

III. MEMBER RESPONSIBILITIES

- 3.1 Any Member that chooses to join OhioLINK acknowledges and agrees that membership in OhioLINK is expressly conditioned on:
 - a) payment of invoices, fees, dues, and usage charges owing under this Agreement; and
 - b) compliance with all of the terms and conditions set forth herein.

By signing and returning the signature page to this Agreement, Member agrees: 1) that it is eligible to participate in this Agreement; and 2) that the undersigned is duly authorized and has all requisite power, authority and capacity to execute this Agreement and to bind and obligate Member to its terms; and 3) to be bound by the terms and conditions set forth herein for the entire term of this Agreement.

- 3.2 Member shall abide by the terms of this Agreement as well as the OhioLINK policies, circulation policies and procedures available to Members on the OhioLINK website or otherwise distributed to Members.
- 3.3 Member represents and warrants that Member has identified all existing Affiliates on Appendix A to its signature page and hereby assumes full responsibility for and shall take reasonable steps to ensure that each of its Affiliates:
 - a) complies fully with the terms and conditions of this Agreement;

- b) provides its Local Shared Collection for circulation to all Members; and
 - c) complies with third-party terms and conditions of any OhioLINK vendor.
- 3.4 No additional Affiliates of a Member may be added to this Agreement without prior written permission of the Ohio Board of Regents, OhioLINK, Member's Library Director or designee, and LAC, and as memorialized in a written amendment to such Member's signature page. Member agrees to be the sole communication conduit with and representative to OhioLINK for all of its Affiliates.
- 3.5 Member shall provide OhioLINK access to at least fifty percent (50%) of the physical collection maintained by Member and by each Affiliate, which shall become a part of the Local Shared Collection. Member agrees to fully supply access to its Local Shared Collection under OhioLINK circulation policies, which are available by request to the Executive Director of OhioLINK.
- 3.6 Member shall provide to OhioLINK the appropriate bibliographic and holdings databases for its Local Shared Collection as soon as possible and shall provide additional materials to OhioLINK on an ongoing basis (new or retrospectively converted material) by and through mutually acceptable means.
- 3.7 Member's Library Director or a representative appointed by the Library Director who has the appropriate budgetary and administrative authority to represent Member in all matters related to this Agreement shall attend and actively participate in Meetings on a regular basis. LAC and OhioLINK committees rely on consortial decision-making processes to recommend to the Ohio Board of Regents which resources and services should be supported with state funds. Member acknowledges and agrees that Member is obligated to abide by this Agreement and any decisions made at Meetings regardless of whether Member attended or participated in any Meeting.
- 3.8 Member acknowledges and agrees that Member is responsible for obtaining authorization from publishers and vendors for any Local Shared Collection that Member makes available to OhioLINK. Such authorization shall include OhioLINK and all Members and shall not obligate OhioLINK, Fiscal Agent or any other Member to pay or incur any additional fee(s) or to incur any liability for use of said Library Materials in a manner that is more restrictive or materially different than any then current OhioLINK policy. Member shall provide OhioLINK with a copy of any such authorizations to OhioLINK upon request.
- 3.9 Member shall comply with all OhioLINK agreements that govern Member's use of Core Services or Opt-In Services. Member shall take all reasonable steps to ensure compliance with the acceptable use policies or other license terms required by such contracts and shall include statements about acceptable use of materials and authorized users through whatever means are effective and reasonable including by paper notice, on Member's library web sites, and through remote authentication pages. OhioLINK will provide Member with copies of any such contracts upon request.

Member shall cooperate with OhioLINK regarding any inquiry into the usage of services by Member, Affiliate, or unapproved user.

- 3.10 Member shall acquire, install, and maintain the appropriate technological infrastructure to enable physical and electronic connection to the OhioLINK System in a secure manner. Member must maintain access and authentication systems sufficient to specifically identify their Member's users within internet protocol, remote authentication, and reporting systems in order to protect against and prevent unauthorized use. Member shall supply all technical information required by OhioLINK to enable access to and maintain security of the OhioLINK System.

IV. LICENSURE AND OWNERSHIP OF DATA

- 4.1 Data obtained by OhioLINK from Member are hereby licensed in perpetuity to the State of Ohio for use in achievement of OhioLINK's goals, subject to any third-party license restrictions attached to such data.
- 4.2 Data obtained by Member from OhioLINK are hereby licensed in perpetuity to Member, subject to any third-party license restrictions attached to such data, and provided that Member has paid all invoices in full.
- 4.3 Member agrees that neither OhioLINK nor Fiscal Agent has any obligation to maintain or archive data obtained from Member. Membership in OhioLINK does not relieve Member from any obligations it may have to maintain any of Member's data or Local Shared Collection.

V. FEES & INVOICES

- 5.1 OhioLINK shall send invoices of amounts due and owing under this Agreement to Member by physical or electronic means to the address for Member set forth on the Member's signature page.
- 5.2 Payments of all invoices shall be made promptly by Member to OhioLINK via electronic transfer, check, or any means mutually acceptable to the parties.
- 5.3 OhioLINK will invoice and Member agrees to pay for all goods and services provided under this Agreement including the following:

- a) the annual OhioLINK membership fee as determined by OhioLINK for Core Services, which shall be due and payable on or before May 1st of each year for the next Fiscal Year; and
 - b) any OhioLINK Central Collection content purchased by Member shall be: i) assessed to Member by OhioLINK at the same rates and costs as OhioLINK pays to its vendors; ii) invoiced to Member as soon as possible after actual vendor rates are known; and iii) paid by Member as directed by OhioLINK within thirty (30) days after the receipt of invoices; and
 - c) any Opt-In Services purchased by Member shall be: i) assessed to Member at the actual cost of the materials or services; ii) invoiced to Member as soon as possible after actual vendor rates are known; and iii) paid by Member as directed by OhioLINK within thirty (30) days after the receipt of invoice. For purposes of this Paragraph 5.3(c)(i), the actual cost of materials or services means the same rates and costs as OhioLINK pays to its vendors for the same materials or services; or, if an Opt-In Service is developed and supported by OhioLINK, at a rate determined by OhioLINK, in its sole discretion, which includes all reasonable costs incurred by OhioLINK to develop, maintain, and administer the materials or services.
- 5.4 OhioLINK will invoice and Member agrees to timely pay for all services provided to any of its Affiliates. Member will be solely responsible to collect fees, dues and usage charges from its Affiliates.
- 5.5 OhioLINK shall make all reasonable, good faith efforts to collect and refund to Members any amounts collected from vendors as penalties, fees, or rebates owed to OhioLINK pursuant to contracts between OhioLINK and such vendors.
- 5.6 Member acknowledges and agrees that any fees for services remitted under this Agreement may be non-refundable.

VI. TERMINATION OR SUSPENSION

- 6.1 In order to negotiate the most favorable pricing possible and service delivery for all Members, Member acknowledges that OhioLINK must commit to long-term vendor contracts well in advance of needed access. To facilitate this requirement, participation in OhioLINK for an entire Fiscal Year is required and Member shall notify OhioLINK of intent to terminate this Agreement in sufficient time, as defined below, for OhioLINK to negotiate or renegotiate contracts with vendors on behalf of all Members. This Agreement may only be terminated, as to the terminating Member, as follows:
- a) By mutual consent of OhioLINK and Member and upon such terms as OhioLINK and Member may agree; or

- b) Member may, at its discretion, terminate this Agreement by delivering written notice to OhioLINK no later than May 1st preceding the Fiscal Year after which the Agreement will terminate (i.e. at least fourteen (14) months before termination). Termination under this provision shall not result in a refund of the annual fee for Core Services paid for the current Fiscal Year; or
- c) Either OhioLINK or Member may terminate this Agreement upon material breach of this Agreement by the other and failure to cure said breach for thirty (30) days after providing notice of the breach pursuant to Section 7.8 of this Agreement, or such longer period of time as OhioLINK and Member may mutually agree. For clarity, Member's failure to timely pay any fees, charges, or invoices due and owing under this Agreement shall be deemed to be a material breach of this Agreement; or
- d) Either OhioLINK or Member may terminate this Agreement for failure of Member to secure budgetary authority or lawful appropriation sufficient to meet its obligations under this Agreement, and any Party may terminate this Agreement if a material change in state or federal law makes continuation of this Agreement illegal or impracticable. Termination under this Paragraph (d) may occur immediately upon receipt of notice from the terminating Party to the other Party.

For the avoidance of doubt, the termination of this Agreement with respect to one or more Members pursuant to this Section 6.1 shall not impact the validity and enforceability of this Agreement with respect to the remaining Members.

6.2 Upon termination of this Agreement, OhioLINK and the terminated Member shall mutually determine which Local Shared Collection data contributed by Member shall be retained by OhioLINK as Library Materials and which data must be removed by Member.

- a) As to data that OhioLINK will maintain, and except as otherwise prohibited by law and pursuant to Section 4.1 of this Agreement, OhioLINK may maintain such data including but not limited to bibliographic and provenance data and may remove any attribution to Member from the data.
- b) As to data that Member will remove from the OhioLINK System, Member is responsible for withdrawing its own data from the OhioLINK System within thirty (30) days of termination. If Member fails to remove said data, OhioLINK may assess the cost of removing said data against Member and Member shall pay OhioLINK for the actual costs assessed to OhioLINK for removal of the data.
- c) OhioLINK will make reasonable and good faith efforts to facilitate continuing access to any previously purchased data or content for any terminated Member to the extent permitted pursuant to the underlying agreements with vendors or other resource providers and/or applicable law.

- d) In the event Member is unable or fails to cooperate with OhioLINK regarding identification and removal of its data within thirty (30) days after termination of this Agreement, OhioLINK may, in its sole discretion, maintain or remove Member's data. If OhioLINK chooses to remove any Member data pursuant to this Paragraph 6.2, OhioLINK may assess the cost of removing said data against Member and Member shall pay OhioLINK for the actual costs assessed to OhioLINK for removal of the data.
- e) In no event shall OhioLINK have any duty to remove, return or maintain any data of a terminated Member, nor have any ongoing obligation to a terminated Member with respect to same.

6.3 Unless mutually agreed by OhioLINK, Fiscal Agent, and Member, termination of this Agreement shall not relieve Member of any obligations or responsibilities incurred prior to termination.

6.4 This Agreement shall automatically renew for an additional Fiscal Year if not terminated as outlined herein.

6.5 Notwithstanding any other provision in this Agreement, OhioLINK may suspend services under this Agreement if Member is in breach of this Agreement. OhioLINK may reinstate services to Member once the breach is cured and upon such terms as OhioLINK may impose. During any term of suspended services, Member's obligations to OhioLINK under this Agreement shall remain in full force and effect.

VII. GENERAL TERMS

7.1 This Agreement contains the entire agreement between the Parties with respect to the matters referenced herein, and supersedes any prior written or oral agreement.

7.2 This Agreement may only be amended by approval of: i) OhioLINK; ii) Fiscal Agent; and iii) LAC. No such amendment shall be effective until: a) the OhioLINK Advisory Board approves the amendment; and b) OhioLINK sends written notice of the amendment to each Member at the most recent address provided by Member pursuant to this Agreement.

7.3 This Agreement may not be assigned except as follows:

- a) Member may not assign this Agreement without the express written consent of OhioLINK.
- b) The Ohio State University ("OSU") is the current Fiscal Agent, however if OhioLINK's fiscal agent changes, this Agreement shall be assigned from OSU to the new fiscal agent, and such then-current OhioLINK Fiscal Agent shall be deemed OhioLINK's Fiscal Agent hereunder.

c) The rights, powers, and remedies of each Party shall inure to the benefit of such Party and its successors and permitted assigns.

7.4 No waiver of any provision of this Agreement shall be effective unless set forth in writing signed by the Party making such waiver, and any such waiver shall be effective only to the extent it is set forth in such writing. Failure by a Party to insist upon full and prompt performance of any provision of this Agreement, or to take action in the event of any breach of this Agreement, shall not constitute a waiver of any rights of such Party.

7.5 In the event that any provision of this Agreement is deemed to be invalid, illegal or unenforceable, the validity and enforceability of the remaining provisions, or portions or applications thereof, shall not be affected and shall remain in full force and effect.

7.6 This Agreement may be executed in counterparts, and all said counterparts when taken together shall constitute one and the same Agreement.

7.7 WITH RESPECT TO ANY THIRD PARTY SOFTWARE OR CONTENT PROVIDED TO MEMBER UNDER THIS AGREEMENT, MEMBER AGREES THAT (I) THE PROVISION OF CONTENT IS SUBJECT TO AVAILABILITY FROM THIRD PARTY CONTENT PROVIDERS, AND OHIOLINK AND FISCAL AGENT SHALL HAVE NO LIABILITY SHOULD SUCH CONTENT BECOME UNAVAILABLE FOR ANY REASON OR IS NO LONGER AVAILABLE UNDER REASONABLE COMMERCIAL TERMS; (II) MEMBER'S USE OF ANY THIRD PARTY SOFTWARE OR CONTENT SHALL BE SUBJECT TO, AND MEMBER AND ALL USERS SHALL COMPLY WITH, ANY APPLICABLE THIRD PARTY LICENSE AGREEMENT, ACCEPTABLE USE POLICY OR OTHER DOCUMENTATION; (III) OHIOLINK AND FISCAL AGENT MAKE NO WARRANTY WITH RESPECT TO ANY THIRD PARTY SOFTWARE OR ANY CONTENT; AND (IV) MEMBER'S SOLE REMEDY WITH RESPECT TO SUCH THIRD PARTY SOFTWARE OR ANY CONTENT SHALL BE PURSUANT TO THE ORIGINAL LICENSOR'S WARRANTY, IF ANY, TO THE EXTENT PERMITTED BY THE ORIGINAL LICENSOR. CONTENT AND THIRD PARTY SOFTWARE ARE MADE AVAILABLE ON AN "AS IS, AS AVAILABLE" BASIS.

OHIOLINK AND FISCAL AGENT EXPRESSLY DISCLAIM TO THE MAXIMUM EXTENT PERMITTED BY LAW, ALL WARRANTIES, EXPRESS OR IMPLIED, ORAL OR WRITTEN, INCLUDING, WITHOUT LIMITATION: (i) ANY WARRANTY THAT ANY SOFTWARE, CORE SERVICE, OPT-IN SERVICE, OHIOLINK SYSTEM, CONTENT, DELIVERABLE OR OTHER SERVICES ARE ERROR-FREE OR WILL OPERATE WITHOUT INTERRUPTION OR THAT ALL ERRORS WILL BE CORRECTED; AND (ii) ANY AND ALL IMPLIED WARRANTIES OF MERCHANTABILITY FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT; AND (iii) ANY WARRANTY THAT CONTENT AND/OR THIRD PARTY SOFTWARE WILL BE ACCURATE, RELIABLE AND ERROR-FREE AND (iv) ANY AND ALL IMPLIED WARRANTIES ARISING FROM STATUTE, COURSE OF DEALING, COURSE OF PERFORMANCE OR USAGE OF TRADE.

7.8 Any notice under the terms of this Agreement required to be in writing shall be duly given upon delivery, if delivered by hand, facsimile transmission, or mail, as follows:

If to OhioLINK, to: 1224 Kinnear Road
Columbus, Ohio 43212
Attention: Executive Director
Facsimile: (614) 228-1807

If to Member, to: The address and facsimile number set forth on Member's Signature page hereto or to such other addresses or facsimile numbers as may be specified by like notice to the other.

(Signature pages to follow)

SAMPLE

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their authorized representatives.

**The Ohio State University, as fiscal agent for
Ohio Library and Information Network**

By: _____

Geoffrey S. Chatas, Senior Vice President
for Business and Finance and Chief
Financial Officer

Date: _____

Ohio Library and Information Network

By: _____

Gwen Evans, Executive Director

Date: _____

SAMPLE

Member Signature Page

("Member")

Institution Name

Address

Library Director or Authorized OhioLINK contact

Telephone Number

Email

Member agrees to be bound by the Consortium Agreement and agrees to comply with all terms and conditions herein.

FOR MEMBER:

Sign

Print Name and Title

Date

Sample MOU Appendix A

Affiliates of _____

(Insert Member Name)

The following Affiliates are included in the terms and conditions of this Agreement.

1. _____
2. _____
3. _____
4. _____
5. _____

No Affiliate may be added to this Appendix or allowed to utilize OhioLINK services absent express written permission of the Ohio Board of Regents, OhioLINK and the Member's Library Director or other authorized agent.

Date: _____

Sample MOU Appendix B

Current Members

The following are current Members and are included in the terms and conditions of this Agreement:

Antioch College
Antioch University
Ashland University
Athenaeum of Ohio
Baldwin Wallace University
Belmont College
Bluffton University
Bowling Green State University
Bowling Green State University – Firelands
Capital University
Capital University Law School
Case Western Reserve University
 Affiliate: Rock and Roll Hall of Fame Library and Archives
Case Western Reserve University – Health
Case Western Reserve University – Law Library
Cedarville University
Central Ohio Technical College
Central State University
Cincinnati Christian University
Cincinnati State Technical and Community College
Clark State College
Cleveland Clinic
Cleveland Institute of Art Library
Cleveland Institute of Music
Cleveland State University – Michael Schwartz Library
Cleveland State University – Marshall College of Law Library
College of Wooster, The
Columbus College of Art and Design
Columbus State Community College
Cuyahoga Community College
Defiance College
Denison University
Eastern Gateway Community College
Edison State Community College
Franciscan University of Steubenville
Franklin University

Heidelberg University
Hiram College
Hocking College
John Carroll University
Kent State University (all campuses: Ashtabula, East Liverpool, Geauga, Salem, Stark, Trumbull, Tuscarawas)
Kenyon College
Lake Erie College
Lakeland Community College
Lorain County Community College
Lourdes University
Malone University
Marietta College
Marion Technical College
Mercy College of Ohio
Methodist Theological School in Ohio
Miami University
Miami University Hamilton
Miami University Middletown
Mount Carmel College of Nursing
Mount St. Joseph University
Mount Vernon Nazarene University
Muskingum University
North Central State College
Northeast Ohio Medical University
Affiliate: Akron Children's Hospital Mary Hower Medical Library
Affiliate: Akron City Hospital Medical Library
Affiliate: Akron General Medical Center Medical Library
Affiliate: Aultman Hospital Health Sciences Library
Affiliate: Mercy Medical Center Medical Library
Affiliate: Northside Medical Center Health Sciences Library
Affiliate: St. Elizabeth Medical Health Center
Affiliate: Barberton Hospital Medical Library
Affiliate: Robinson Memorial Hospital Health Library
Northwest State Community College
Notre Dame College
Oberlin College
Ohio Christian University
Ohio Dominican University
Ohio Northern University (includes Law Library)
Ohio State University Libraries – Main, The
Ohio State University Agricultural Technical Institute
Ohio State University Health Sciences Library
Affiliate: Nationwide Children's Hospital
Ohio State University Moritz Law Library, The
Ohio State University at Lima, The

Bromfield Library and Information Commons (Ohio State University – Mansfield)
Ohio State University at Marion, The
Ohio State University at Newark, The
Ohio State University – Ohio Agricultural Research and Development Center
Ohio University Libraries
Ohio University – Chillicothe
Ohio University Eastern
Ohio University – Ironton (Southern)
Ohio University Lancaster (OUL)
Ohio University Zanesville
Ohio Wesleyan University
Otterbein University
Owens Community College
Pontifical College Josephinum
Rhodes State College
Saint Mary Seminary and Graduate School of Theology
Shawnee State University
Sinclair Community College
Southern State Community College
Stark State College
State Library of Ohio
Terra State Community College
Tiffin University
Trinity Lutheran Seminary
University of Akron, The
University of Akron - Law
University of Akron Wayne College Library, The
University of Cincinnati (including Lloyd, Blue Ash, and Clermont)
 Affiliate: Cincinnati Children's Hospital and Medical Center
Robert S. Marx Law Library at the University of Cincinnati College of Law
University of Cincinnati – Med
University of Dayton
University of Dayton School of Law
University of Findlay, The
 Affiliate: Winebrenner Theological Seminary
University of Mount Union
University of Northwestern Ohio
University of Rio Grande / Rio Grande Community College
University of Toledo Carlson Library, The
University of Toledo – Health, The
University of Toledo – Law, The
Urbana University
Ursuline College Ralph M. Besse Library
Walsh University
Washington State Community College
Wilberforce University

Wilmington College
Wittenberg University
Wright State University Libraries
 Affiliate: Dayton Children's Hospital Library
 Affiliate: Dayton Veterans Affairs Hospital Library
 Affiliate: Good Samaritan Hospital Library
 Affiliate: Grandview Hospital Library
 Affiliate: Kettering College Library
 Affiliate: Kettering Medical Center Library
 Affiliate: Miami Valley Hospital Library
Wright State University – Lake Campus
Xavier University
Youngstown State University
Zane State College

Date: _____

SAMPLE

Appendix 12: OhioLINK Highlights Timeline

1986 - Ohio Board of Regents form Library Study Committee to address the problems of library space (Hawks, 62 News Clippings Binder 1991– 1993).

1988- Three committees formed concerned with views of users, librarians, and system managers to decide requirements, turning into five sub committees (Hawks, 62 News Clippings Binder 1991– 1993).

1990 - Innovative Interfaces selected for Integrated Library System software and Central Catalog (Hawks, 62 News Clippings Binder 1991– 1993).

1992 - University of Cincinnati becomes first institution to go live on Innovative, followed by Miami University (Information Today, Dunn, News Clippings Binder 1991– 1993). Central Catalog goes live in November. Tom Sanville hired as executive director.

1994 - Final Phase II participants go live by end of year (BGSU Libraries, 1991– 1993 News Clippings Binder). OhioLINK members increase to 18. Online borrowing becomes available (Update, August 1995).

1995 - Journal articles delivered online to 13 campuses—users can print the full text from Periodical Abstracts and ABI/Inform to a local printer (Update, March 1996). Private colleges are added to OhioLINK (Update, March 1997).

1996 - In February, WWW site debuted, replacing dumb terminals in libraries (Update, March 1996).

1998 - Electronic Journal Center implements searching across titles from multiple publishers in a single search (Update, March 1998).

1999 - Remote access to resources via the internet made possible by OhioLINK authentication system (Update, September 1998). The Digital Media Collection (DMC) debuts in spring featuring art images (Update, March 1999). EJC wins national innovation award from the council of state governments, holds over 1 million articles, making it the largest locally stored electronic journal collection in the country (Update, September 1999).

2000 - OhioLINK wins Academic Excellence and Cost Management Award from the American Council on Education (Snapshot, 2000).

2002 - Electronic Theses and Dissertations is launched, a statewide repository for open access dissertations and theses from Ohio graduate programs. OLinks, a link resolver, debuts allowing users to go seamlessly between citations and full-text articles (Update, April 2002). Statewide collaborative online chat service Know-it-Now begins (Update, April 2002).

2003 - Libraries Connect Ohio partnership founded. OhioLINK, INFOhio (the K – 12 library consortium) and OPLIN (the public library consortium) license a suite of databases and other resources for statewide use with contributions from the partners and federal LSTA funding.

2004 Cuyahoga Public Library and Westerville Public Library added as pilot for expansion of lending to public libraries (Press Clippings 2003 – 2005, Library Journal, September 15, 2004).

OhioLINK supports open access by funding portion of fee for faculty and researchers publishing in the journal PLoS (Press Clippings 2003 – 2005, Hotline, June 7, 2004).

2005 OhioLINK institutes a membership fee for the first time to help manage cuts in the budget (Update, April 2005). Database with test prep materials available to all citizens through a pilot project with State Library of Ohio, INFOhio and OPLIN (Press Clippings 2003– 2005, Library Hotline, July 18, 2005).

2006 Quick Search @ OhioLINK allows a single search across the Central Catalog, the EJC, and multiple databases (Update, April 2006).

2007 Creation of the Electronic Book Center (EBC), containing e-books from multiple publishers (Update, Fall 2007). Digital Resource Commons (DRC) debuts allowing institutions to upload their own digitized special collections images and media into a searchable central repository (Update, Fall 2007).

2009 EJC crashes, leaving articles unavailable from days to months (Media Clips 2006 – 2009, Library Journal March 15, 2009). OhioLINK implements dual access at EJC and publisher sites in response. First hosted institutional repositories (the individual DRC program) come online. Wright State was the first repository to go live, featuring the Wright Brothers collections of photographs and documents.

2010 Sanville resigns to join Lyrasis, John Magill becomes executive director. DRC wins American Library Association's (ALA) Award for Cutting Edge Technology Services (Snapshot (online), 2010). EJC contains 25 percent of world's scientific content (Snapshot (online), 2010) after the purchase of the Elsevier backfiles.

2011 OhioLINK wins national \$750,000 EDUCAUSE grant for Scaffold to the Stars, a peer-evaluated Open Educational Resources database to help instructors redesign courses with open materials. OhioLINK prominently mentioned as a successful shared service in the state government's Mid-Biennium Review. Chancellor's office creates the higher education technology consortium OH-TECH, OhioLINK included. OhioLINK's OHDEP catalog goes live.

2012 John Magill steps down, Gwen Evans becomes executive director (LAC 201209 Summary). OhioLINK wins a national NEH Digital Humanities grant for the Scholar's Dashboard.

2013 OhioLINK ends its individual institutional repository hosting program at the recommendation of the deans and directors. At its peak, there were 27 instances of DSpace centrally hosted by OhioLINK. OhioLINK changes fiscal agent from Wright State to Ohio State to fully merge with the OH-TECH consortium.

2014 OhioLINK manages the implementation of EBSCO's EDS Discovery Service—creating a single Google-like search over multiple resources—for 60-plus OhioLINK institutions (2013– 2014 annual report, ohiolink.edu/oh-tech.org/discoverydiaries). The Memorandum of Understanding between institutions and OhioLINK is completely updated for the first time in over 20 years. For the first time in a decade, OhioLINK receives a substantial capital funding increase of 33 percent for e-journals in the EJC (2013– 2014 annual report). Demand driven acquisitions consortial e-book pilot with YBP, and selected publishers begins. OhioLINK begins cataloging e-books centrally, bearing the workload previously done by volunteer catalogers.

2016 EJC redesigned and migrated to new platform, including full-text search of over 20 million articles (annual report, 2015– 2016, ohiolink.edu/ejcupgrade). OhioLINK commits to digital preservation of locally held materials, begins implementation of Rosetta software. LSTA grant for data analysis of unique materials in the Southeast regional book depository awarded to OhioLINK and Ohio University.

2017 OhioLINK begins major support of Affordable Learning textbook initiatives in the state, joining the Open Textbook Network, building a centralized website for OER resources, and acquiring the OER Commons as a hosting portal for OER resources to support a \$1.3 million grant to institutions for OER (ohiolink.edu/takestep).

2018 OhioLINK negotiates and secures groundbreaking statewide wholesale price agreements with the major textbook publishers for inclusive access e-books.

2019 Inclusive access agreements used in tandem with OER adoption help to provide a range of options for faculty. While inclusive access is low- not no-cost, they are often the least time-consuming curriculum change for faculty while still providing savings for students (Bendo & Evans, 2019).

2020 OhioLINK's "Transforming the ILS" working group [envisions the integrated library system](#) and concludes that the market hasn't kept up with libraries' needs. The work of the task force culminated in publication of a white paper, "[It's Not What Libraries Hold; It's Who Libraries Serve. Seeking a User-Centered Future for Academic Libraries](#)" that outlined ideas to improve our current systems with the intent of generating discussion and innovation in the ILS marketplace.

2020 [Amy Pawlowski is appointed OhioLINK executive director](#). Pawlowski joined OhioLINK in 2013 as deputy director for operations and e-licensing, and served as interim director after Gwen Evans' departure.

2020 OhioLINK suspends network print lending due to the global COVID pandemic and [secures Governor's Emergency Education Relief \(GEER\)](#) funding to provide institutions with additional resources to support online and hybrid teaching and learning.

2021 To improve its technology's stability, security, and user experience, OhioLINK implements major updates to its Electronic Book Center, Electronic Journal Center, Electronic Theses and Dissertations Center, and eTutoring platforms.

2022 OhioLINK offers its first [OER Course Redesign Grants](#) to assist Ohio faculty in identifying relevant OER and library provided materials for a course. Twenty-nine faculty members applied for the program. As a result, up to 4,000 Ohio college students could save as much as \$300,000 on textbooks each semester, with savings compounding each semester as faculty continue to use the materials.

2022 OhioLINK receives funding through the Ohio Department of Higher Education (ODHE) for its 117 members [to replace its shared Integrated Library System \(ILS\)](#). This approach brings efficiencies of scale for a much better and more cost-effective solution than if each institution addressed its ILS system individually.

2022 OhioLINK enters into cost-neutral “read and publish” agreements with Cambridge University Press and Wiley that add access to additional journals in the EJC and help 25 institutions avoid \$1,454,514 of article publishing charges in the agreements’ first 8 months.

2022 Executive Director Amy Pawlowski publishes a 2-part article on OhioLINK’s history in the Journal of Library Administration: Part I, [VOL. 62, NO. 3, 387–395](#); Part II, [VOL. 62, NO. 5, 699-707](#).

2022 [OhioLINK marks 30 years of innovation for Ohio's academic libraries](#)

2023 [OhioLINK and IOP Publishing sign transformative agreement](#).

2023 [OhioLINK selects Ex Libris Alma and Primo as next library services platform](#) and begins a 2-year implementation process.