Membership Report

FISCAL YEAR 2023

OhioLINK

OH·TECH | Ohio Technology Consortium
A Division of the Ohio Department of Higher Education

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From the Executive Director

Thanks for reviewing our Fiscal Year 2023 Membership Report. You'll see highlights, updates from OhioLINK's Associate Directors in our three main areas of operation, and quick visuals on OhioLINK metrics. I think you'll agree the work we've been able to accomplish over the last fiscal year is beyond impressive.

At the one-year point, we are excited to now turn the corner into the implementation phase in our historic, capital-funded, membership-wide ILS migration. The dedication and expertise from our members who worked throughout the ILS RFP process not just for their own institution, but on behalf of the entire consortium, is yet another testament in OhioLINK's long history of collaboration.

Because librarians are intrinsically planners, I expect that when we look back on this period, we will appreciate the teams and schematics that we created. As OhioLINK worked with organizational psychologist and collaboration expert Deb Mashek for the Summit keynote and June directors' workshop, it was reassuring to see that we were already using many of Mashek's strategies and tactics, affirming that OhioLINK is on the right track.

It makes me appreciate the forethought of the Ohio Board of Regents (now Department of Higher Education) and its 1987 Library Study Committee that defined state support, broad participation, and diverse input as the foundation for what became the OhioLINK consortium. A former Vice Provost said it well when he said that OhioLINK isn't a bureaucracy that dictates actions. "OhioLINK is us."

Thank you to our member institution deans, directors, and library staff, to the OhioLINK team, and to all the library organizations and consortia that we learn from and collaborate with to bring resources and services to our users.

Amy

2023 Highlights

Affordable Learning

OhioLINK completed its third round of Affordable Learning Course Redesign Grants. Since early 2022, 89 faculty from 31 institutions have learned about teaching with Open Educational Resources (OER) and reviewed their syllabus with an OER specialist librarian. If the grantees did convert their course to OER and taught it for just one semester, 22,000 Ohio students would avoid spending $1.15 million. Faculty enthusiasm for the program remains strong, and a fourth cohort is planned for fall 2023.

OhioLINK Affordable Learning has met with Intel and its grant recipients to advocate for the adoption of open and adaptable course materials for microchip-related courses and job training programs. In May, the Ohio Association of Community Colleges (OACC) Semiconductor Collaboration Network, spearheaded by Columbus State Community College, added three courses to establish the Ohio Semiconductor Education & Research Program collection in OhioLINK's Open Course Content Library. Any OER created through the Intel grants will be added to the collection.

Twenty-three OER courses in the Ohio Open Ed Collaborative (OOEC) site are being updated to expand available resources and make the content more user-friendly. Columbus State Community College and Owens Community College now have dedicated hubs for OER created by their faculty.

OhioLINK negotiated renewed Inclusive Access contracts with Pearson, McGraw-Hill Education, Cengage, and Sage. These "first day" agreements reduce the price of e-textbooks by up to 80% and courseware by up to 55% for students.

eTutoring

In April, OhioLINK welcomed Patti Grimes to the eTutoring program. Outreach to the eTutoring Campus Coordinators and Advisory Council members will inform a needs assessment as part of a strategic program plan for 2024.

Luminaries Program

Established in 2017 to introduce undergraduate students from underrepresented communities to librarianship, the Luminaries alumni now number 21. Students report in end-of-year surveys that they are very happy with their work experiences and would recommend the program to a friend. Three alumni are already in an MLIS program and five more have expressed an interest in pursuing an MLIS. Twelve institutions are recruiting or have hired students for 2023–2024.

Member support

OhioLINK helped stand up a new Resource Challenges Community of Interest (COI). These library staff-run discussion groups address best practices, issues, and solutions for topics of interest to members.

OhioLINK members continue to use online meetings as a way to plan, engage, and build consensus. Last year, the number of online meeting attendees increased by 69% and the number of OhioLINK meetings increased by 40%. For some OhioLINK staff, this has meant juggling eight weeks of time devoted to supporting Webex meetings!

Summit

OhioLINK's annual member webinar series wrapped with strong engagement: 999 total attendees; 434 unique attendees. Many thanks to the Summit Planning Committee, chaired by Katy Kelly of the University of Dayton and Sean Kennedy of Kent State University, and all the Summit presenters for sharing their time and expertise with the OhioLINK community.

ILS RFP: Progress to Date

As we prepare to move into the Implementation Phase of OhioLINK's historic ILS migration, it's worth reviewing the "why" as well as the "what and how."

OhioLINK's ILS upgrade will position the consortium and its member libraries to support 21st century teaching, learning, and research as well as streamline day-to-day operations. The new multi-tenant system structure also enables OhioLINK to provide more direct support for member libraries in needed areas, such as in systems and e-resources. Equally important, the new cloud-based software minimizes the risks of security breaches, ransomware, and operational failures.

Years before the ILS Request for Proposal (RFP) was even a possibility, the consortium had been preparing for change in our ILS system: a Request for Information and vendor presentations in 2015, a systems software industry assessment and a business requirements document in 2017, an ILS Revisioning Task Force, and the 2020 whitepaper, and then a member-wide systems webinar series throughout fall 2021.

If luck is when preparation meets opportunity, OhioLINK was very lucky. By early 2022, OhioLINK had built a solid foundation of knowledge about what was available in the ILS marketplace and our member libraries' needs and expectations. In June, with strong justification and the support of the Chancellor in advocating to the General Assembly for the funds to procure the ILS system, the Ohio biennium capital bill for Fiscal Years 2023–2024 included funding for a shared ILS migration for all OhioLINK member libraries' systems.

The yearlong ILS RFP has been a tremendous collective effort. Once funding was announced, OhioLINK immediately pivoted to creating an inclusive and transparent process to support critical decision-making by defining a timeline, building representative teams, gathering consortium feedback, and providing online access to shared information, documents, vendor presentations, and milestone updates as well as regular communications sent through OhioLINK's existing channels.

OhioLINK worked with trusted ILS systems expert Marshall Breeding to serve as an unbiased advisor in the RFP writing process and to moderate a series of six multidisciplinary listening sessions with directors and policy and implementation teams, followed by a membership-wide survey.

By the end of the summer, consortium feedback had been transformed into a needs assessment, and OhioLINK held its first RFP Milestone Update to share progress and review listening session feedback with members.

OhioLINK and the ILS Planning Team spent two months crafting an 82-page RFP that was released in early November through The Ohio State University's procurement department's contract management system. (Ohio State is OhioLINK's fiscal agent). The proposal reflected the priorities defined in the OhioLINK whitepaper, and included digital accessibility requirements, minimum qualifications for both consortial and academic library implementations, and asked for details about multiple implementations to allow the OhioLINK team to interview selected organizations about their experiences and the outcome of working with the submitting vendors.

Vendors were given 14 weeks to prepare proposals. While the RFP was still open, the Planning Team gathered information about adjacent services that would need to be integrated with the ILS. OhioLINK hired Howard Fleeter, an economist who has worked extensively with state organizations and government, to develop a structured approach to evaluate cost allocations for member libraries.

Proposals from Ex Libris, OCLC, and EBSCO were received in February, and OhioLINK moved to the review phase of the RFP process. Each vendor was scheduled for a full-day presentation, and more than 600 library staff members attended each presentation. Member libraries submitted an online assessment of each vendor's product presentation, and the vendors followed up in writing to questions asked during the presentations. These post-presentation responses and the written vendor Q&A were factored into the ILS RFP Selection Team's evaluations.

The Selection Team's extensive process also included reading 1,200 pages of proposals and follow-up Q&A; reviewing the member-wide survey responses; consulting with OhioLINK's CIRM (collections), DIAD (discovery & metadata), and ICS (resource sharing) policy team chairs; interviewing 2–3 current customers (including at least one consortium) for each vendor; extensive discussions with the library systems expert, evaluating OhioLINK's VPAT (Voluntary Product Accessibility Templates) reviews; and then independently scoring each vendor. These evaluations were combined during a final Selection Team meeting at the end of April. At this point, OhioLINK began negotiating the contract with the selected vendor, working towards minimizing costs for members and ensuring that no member libraries would pay overlapping maintenance fees.

In June, organizational psychologist and collaboration expert Deb Mashek conducted a bespoke workshop for library directors at the State Library of Ohio. This discussion started the process for directors to not only address the technical aspects of migration, which will be guided by OhioLINK and Ex Libris, but to also plan for the equally critical local team and communication infrastructure. Mashek provided templated planning documents and took directors through a series of exercises to help them set up conditions for local staff success: identifying the needed skills; planning for the necessary resources, tools, and time; and clearly communicating the process and outcomes with local stakeholders.

With the recent announcement of the selection of Ex Libris as our partner, OhioLINK is excited to bring the RFP to a close and begin implementation. Go live is expected in mid-2025. Just as the yearlong ILS RFP process has been a tremendous collective effort, there will be important roles for the OhioLINK membership in making both policy and technical decisions. OhioLINK and Ex Libris, in collaboration with the recently established Advisory Group, will begin to work on a thorough implementation plan, which will be shared with members in the fall.

It is daunting to consider the scope of the work ahead, but OhioLINK and member libraries will be supporting each other throughout the migration process. Membership feedback and participation has been, and will continue to be, integral to our success. The OhioLINK community has a proven history of working together to coordinate shared solutions that benefit the consortium and member libraries and will continue to keep members involved and informed throughout implementation.
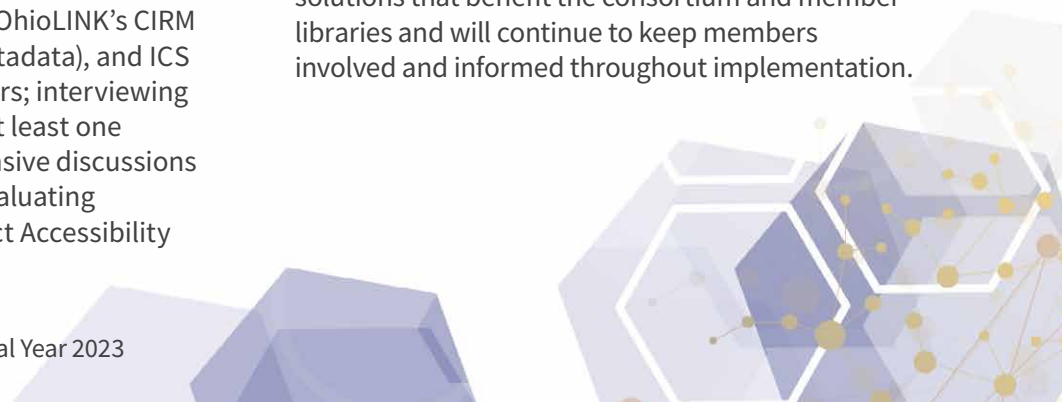
Licensing & Analytics

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Resource review tool

While pandemic contract renegotiations saved members $1.5 million, it shifted our usual renewal period with vendors so that most multi-year core resources would come up for renewal at the end of 2023. The Cooperative Information Resource Management (CIRM) policy team recognized this extraordinary volume of renewals as an opportunity to develop a new tool to support OhioLINK's Collection Development Principles. Developed by a CIRM project team and presented to the Library Advisory Council (LAC), the core resource review tool will be the backbone for CIRM's systematic renewal evaluations. It provides a framework for assessing many resource components, including support for OhioLINK's values, accessibility, subject coverage, audience, and traditional cost and usage metrics to further refine and standardize review processes.

Collaborative collection development

Selecting titles for the ARPA-funded core DEI collection of e-books offered a new kind of collaborative collection development opportunity for OhioLINK. Rather than selecting a set collection from a publisher, a team of librarians authored a purpose statement to shape the collection. The statement's intent was to strengthen engagement with a broader range of communities and provide scholarly materials to support curriculum and research. The collection statement also allowed OhioLINK to encourage ProQuest/Clarivate, selected through an RFP process, to expand their available pool of content with broader subjects and a wider range of publishers. ProQuest Ebook Central waived its standard platform fees for all OhioLINK libraries, saving many members local budget dollars and making it possible for all members to add locally purchased e-books to their library collections. A Phase 1 set of 82 titles is available. Phase 2 is expected this fall.

E-resources for all Ohioans

Every five years OhioLINK works with the State Library of Ohio, INFOhio, and OPLIN through Libraries Connect Ohio to evaluate, select, and fund resources that are available to all Ohio residents. Based on K–12, public, and academic librarians' analysis of their communities' needs, the following e-resources were renewed via a competitive bid process for Fiscal Years 2024–2028: CultureGrams; a custom EBSCO Base Package; Chilton Library; Very Short Introductions; Oxford Research Encyclopedias; and World Book.

E-resources for instruction

A second round of Governor's Emergency Education Relief (GEER) funding in fall 2022 allowed OhioLINK to purchase four additional collections to bridge COVID-created gaps in teaching materials. Guided by a CIRM project team, the collections cover a wide range of disciplines, including humanities, social science, and STEM curriculum, as well as specialized streaming video in counseling and psychology. OhioLINK continued its effort to support member librarians' outreach by creating easy-to-use GEER information that helps faculty understand their options for the new no-cost-to-student course materials.

Open access publishing

OhioLINK continues to advocate for cost-neutral opportunities for open access (OA) agreements— often called "transformative" or "Read & Publish." In January, IOP Publishing, the Institute of Physics' publishing arm, joined Wiley and Cambridge University Press as OhioLINK's third OA publishing deal. These deals not only expand access to journals, but also offer no-cost-to-authors open access publishing without adding any costs for member institutions. Since 2022, authors at 35 public and private institutions have published 1,234 articles and have avoided more than $4.3 million in Article Publishing Charges (APCs). CIRM is currently assessing member feedback for OhioLINK's first OA-deal renewal with Wiley at the end of the year. To help librarians with outreach, OhioLINK created a toolkit of faculty-focused web pages for each publisher, webinars, customizable email templates, and a shareable PDF that addresses what librarians reported as authors' most-asked questions about their OA options.

Member feedback

To understand member libraries' priorities and perspectives and ensure that OhioLINK resource packages continue to align with members' content needs, CIRM and its project teams gathered feedback through surveys about collection priorities, open access, and local journal subscriptions. The knowledge is applied in core resource evaluations and renewals, and shared collections decisions, as well as helps us track trends and future needs.

OhioLINK has conducted its annual member budget survey since 2003. Our most recent analysis showed that while member budgets recovered from FY21 to FY22, libraries did not gain fiscal ground due to inflation. Two decades of aggregated budget trends have been highly effective in helping OhioLINK negotiate contracts on behalf of membership and have supported critical data-driven decisions.

Consortial value remains strong

OhioLINK has just recalculated members' cost avoidance and aggregated discount numbers for e-journal and e-book collections based on 2023 pricing. With the consortium's aggregated purchasing power and by pooling member resources and expertise, OhioLINK is able to provide more than 12,000 academic journals and 270,000 e-books to members at a 97% aggregated discount compared to purchasing the same content at list price. This equals more than $1.3 billion in avoided costs. Our consortium's remarkable strength is that *nobody pays more but everybody gets more*. In other words, for the same cost of making some content available to some, OhioLINK's consortial deals are making all its consortial content available to all.

Operations & Platforms

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Local content/platforms

OhioLINK added just under two million items to locally managed content (a 5% increase) this past year and continues to actively manage the stability, reliability, security, accessibility, and user experience for our shared local platforms, the technology that delivers consortium resources to users. In addition, OhioLINK troubleshoots both local and vendor platforms, addresses authentication issues, and tracks content delivery so our members can be sure they receive access to what they are entitled to.

Technology updates

- **Music Center:** OhioLINK's Music Center was upgraded to an entirely new database platform with new hardware and was also updated with the standard OhioLINK user interface. Music Center statistics are now available in OhioLINK's Member Portal.

- **Finding Aid Repository:** As our last legacy platform reaches its end of life, OhioLINK and Kent State University (which houses the finding aid creation tool) are assessing community needs and usage.

- **Statistics migration:** Archival statistics for the Electronic Book Center (EBC), Electronic Journal Center (EJC), Finding Aid Repository, and Patron-Initiated Circulation (PCIRC) were migrated into the Member Portal and are available to anyone with a login. These self-service stats can be viewed and downloaded at the institutional or consortial level.

- **Rosetta:** OhioLINK protects Electronic Theses & Dissertations and other shared e-resources using the Rosetta digital preservation application. Application, database, and hardware updates for a sandbox system were completed. Production system updates and migration are in process.

Ostaff user experience

OhioLINK library staff members accessed information about OhioLINK resources or teams via Ostaff more than 48,000 times last year. Aware that Ostaff needed attention, the upcoming phased Drupal 9 migration proved a great reason to tackle a redesign. Members reported that their biggest pain points were difficulty finding content and a confusing log-in process. In response, the Ostaff process has changed and its menu structure reorganized to improve navigation. OhioLINK also migrated content that had been in LibGuides into Ostaff. More changes will come in FY24. Members can stay up to date on progress by visiting the Ostaff redesign page.

Digital accessibility

OhioLINK made significant progress toward ensuring that its digital resources are usable regardless of a physical or cognitive disability. The accessibility review will be a standard part of the new CIRM Core Resources Review tool (see the Licensing & Analytics section). After two years of planning and preparation, OhioLINK's open access Electronic Theses and Dissertations (ETD) Center 3.2 release incorporated institutions' local digital accessibility policies and practices into submission workflows to ensure that uploaded ETDs meet minimum accessibility guidelines. In addition, the Accessibility Implementation Team (ACCIT) compiled digital accessibility resources to help member libraries learn more about the fundamentals, including tools for testing and a link to more than 100 Library Accessibility Alliance resource evaluations.

Discovery & Delivery

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Improving access to resources

A library resource can't be used if it isn't found. OhioLINK's cataloging and metadata staff added nearly 6,000 e-book records for purchased content listed in contracts that previously did not have records and boosted discoverability by enhancing records for more than 600,000 titles this year.

With new guidance from the Database Improvement and Discoverability (DIAD) policy team, OhioLINK implemented changes that made it easier for users to quickly link to a resource in the shared Central Catalog. By specifying which links should appear in the 856/956 MARC fields in member-submitted records, the 856 field, which displays prominently in user search results, consistently shows only links to resources, with links to labeled, supplemental information only in the 956 field. Additional information and examples are available for members on Ostaff.

Another DIAD project team curated Inclusive Cataloging vocabularies and resources, also available through Ostaff, to help library staff create more appropriately reflective descriptions for records.

Print lending

Transit times for materials lent through patron-initiated requests among member libraries remain stable, averaging 3.5 days. The state contract with the courier service was renewed until 2025. While still not back to pre-pandemic levels, print borrowing is up 18% over FY22. To promote borrowing from the OhioLINK catalog, an Intercampus Services (ICS) working group prepared talking points on print lending that can be used for local student and faculty outreach.

A senior research project with Baldwin Wallace University applied mathematics students confirmed that the current OhioLINK/State Library courier service is cost effective for distributing library materials across the state. The analysis was part of a year-long senior capstone program that gives students real-world opportunities to apply their quantitative skills. Done in collaboration with the State Library of Ohio and using anonymized data, the students compared the cost of the current courier service to US Postal Service Media Mail, assessed the efficiency of the regional logistics, and analyzed how local delivery frequency impacted the overall system.

Who We Serve

800,000+
higher ed students

49,000+
faculty & researchers

48,000+
state employees

1.6M+
K–12 students

7.7M+
public library cardholders

1.2 INTERACTIONS PER SECOND

STUDENTS, FACULTY & STAFF INTERACT WITH OHIOLINK RESOURCES 38,297,319 TIMES A YEAR

OhioLINK delivers print and e-content for
$51.83 PER STUDENT

IN 2023 OHIOLINK NEGOTIATIONS SAVED
$1.3 BILLION
A **97% DISCOUNT** ON PUBLISHERS' LIST PRICE

Negotiation pays off

OhioLINK keeps annual cost increases below market rates. Average journal costs for packages (3%) and single titles (4%) were much higher than OhioLINK's increase of 1.5% on journal packages.

**1.5%**
packages with OhioLINK

3%
packages without OhioLINK

4%
single titles without OhioLINK

What We Do

Staff Metrics
FY2023

|	
Authority records loaded	69,460
Cataloging records provided	117,594
Catalog records updated	506,797
E-books claimed	4,101
E-journals claimed	7,617
Titles for Knowledge Bases	6,944
Meetings facilitated	268
Members engaged	9,370
Member surveys completed	93
Survey responses analyzed	3,559
eTutoring support hours	984
Contracts processed	36
Invoices created	1,646

86 Licensing & Analytics

2,608
Support Tickets Resolved
(FY2023)

1,340 Delivery & Discovery

1,182 Operations & Platforms
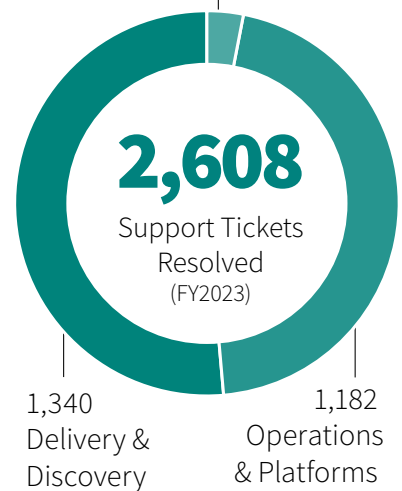
Locally Managed Content
as of June 30, 2023

Digital archive items	59,504,362
E-book titles	173,776
E-theses & dissertations	118,984
E-journal articles	39,597,747
Finding aids	9,578
Music Center items	81,814

Who Uses What

E-book Downloads
2018–2022

| | 2018 | 2019 | 2020 | 2021 | 2022 |
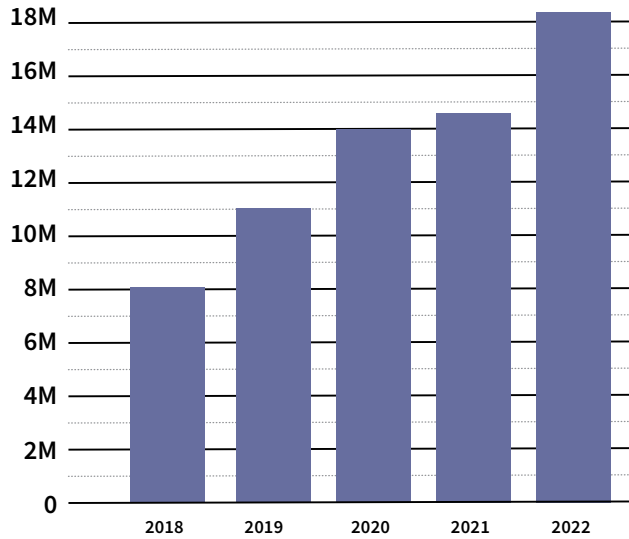
E-journal Article Downloads
2018–2022

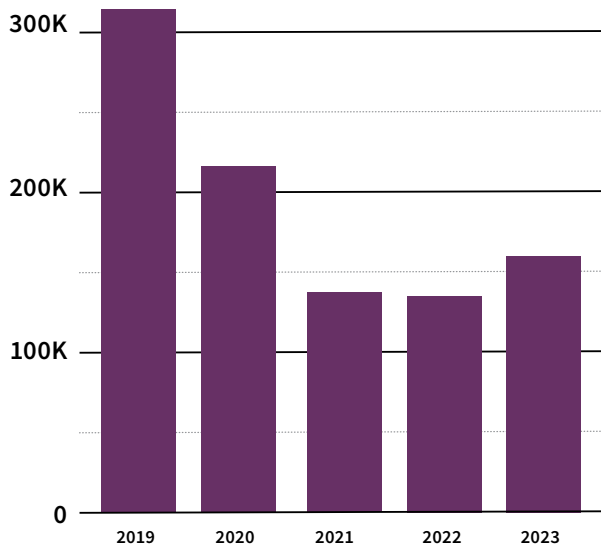| | 2018 | 2019 | 2020 | 2021 | 2022 |
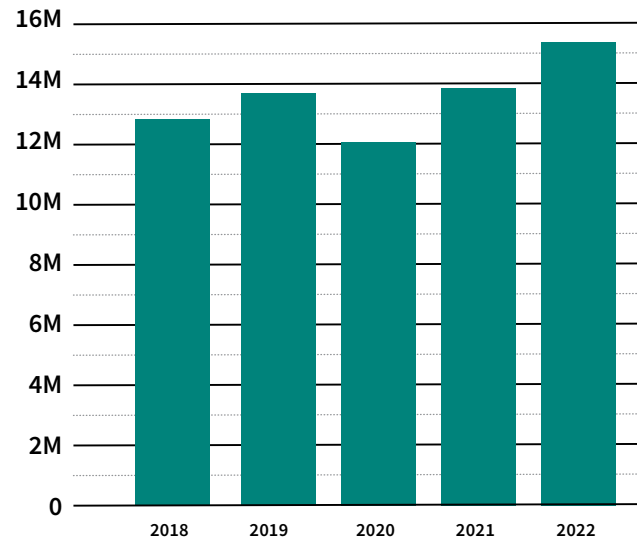
Print Materials Borrowed*
FY2019–2023

*borrowing was suspended March–August 2020 and March–April 2022

E-resource Downloads
2022

e-books
18.2M

4.6M
databases

e-theses &
dissertations
10.3M

e-journals
15.3M
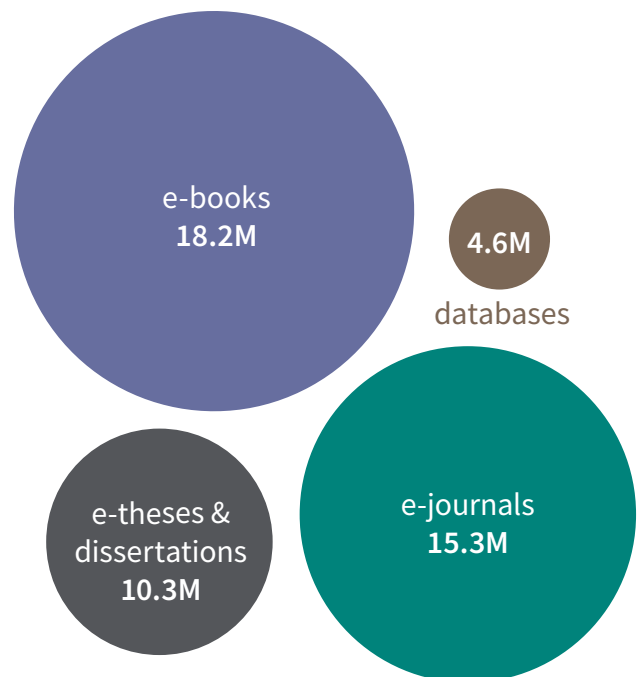
$4,382,225
OF APCS WERE WAIVED FOR AUTHORS FROM 35 INSTITUTIONS FROM JAN 2022–JUNE 2023

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OhioLINK

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