

SIoux COUNTY LIBRARY ASSOCIATION FLEXSHARE CONSORTIA PROPOSAL

July 25, 2022

OVERVIEW

1. Project Background and Description

Improving patron access to information resources is of very high interest for public libraries whose services are built on this foundation. Collaboration and pooling of resources positively impacts individual's and communities' access to information, technologies, and services. Peer-to-peer lending networks enhance already existing ILL services by reducing internal processing, tracking, and fulfillment times. Core collections of immediately available materials are extended through the consortium which allows for patron driven lending through the reserves system.

Six of the eight Sioux County libraries have or will have Biblionix Apollo as their integrated library system (ILS) by the autumn of 2022. Apollo's FlexShare Consortia package is a resource sharing platform within the ILS. This platform allows for the sharing of account records, seamless cross catalog searching, global check-in of materials, patron driven reserves, and the loaning of materials within a consortium, while still maintaining self-government for each individual public library.

The IA Shares courier system available to Iowa public libraries is a transit system initially started with one day of the week for transit of interlibrary loan (ILL) materials. With the addition of a second transit day, the grouping of Sioux County libraries into a shared platform consortium was made a real possibility, as the expedient exchange of materials within the county was previously a barrier to a consortia structure.

The model resembles a multibranch systems of larger libraries which rely on distribution of materials across branches to reduce acquisition costs within the system. The shared infrastructure model of resource sharing mirrors academic libraries and is emerging as a growth technology for public libraries. FlexShare further allows for later inclusion of other libraries operating on the same ILS, and can crossover with similar consortia regardless of geography. In addition, autonomy for each institution is retained as control of billing, ILS options and direct support services remain with each library. There is no additional charge nor entry/exit fee and no impact on the annual fees for participating libraries already using the ILS.

2. Project Scope

The FlexShare model of borrowing and lending shares ILS data within the member libraries. This allows patron searching of member library catalogs resulting in patron driving interlibrary lending. It also provides patrons global access so they may use their home library card within the consortium. Control of patron records remains with the home library. Updates to accounts can only be made at the home library, including changes made via the online public access catalog (OPAC).

Member Search Across Libraries allows for the greatest patron account information access and exchange. This models account information sharing of branch libraries. Cardholders would use one library card across the system. Staff workloads would be reduced as verification of information at home

libraries and issuing new library cards for reciprocal borrowers is eliminated. This reduces abusive cardholder practices and gaming of the system by library card holders. Information sharing includes the viewing of blocks, fines or charges across the system. Outstanding balances can only be resolved at the library of origin. Patron privacy is a principle service tenet for public libraries and would continue to be under this model. Circulation reports include both on site and interlibrary lending statistics. Interlibrary lending reports provide statistics for patron use, collection impact and ILL statistics for reimbursement by the State Library of Iowa.

Notifications for reserves and overdues remain with the library where materials are initially checked out by the patron. If a patron travels to a participating library and checks out materials on site that library retains notification controls. If instead the patron places a reserve for pick up at their home library, notifications originate from the home library.

Electronic resources are available through the home library or any FlexShare account. Restrictions required by vendor agreements can be controlled through Permissions in Setup. Limiting of physical materials remain in control of the lending library. Limits can be set for on site checkouts as well as for interlibrary lending.

Transportation of library materials within Sioux County is facilitated by the IA Shares courier system. Using the system within the consortia replicates a branch system in an urban multibranch system. This allows for checking in of materials at any and all participating libraries regardless of the home library or where the material originated from.

3. High-Level Requirements

The consortium libraries must operate using the following parameters:

- Cardholder accounts origins and reciprocity
 - Cardholder accounts originate in the municipality of residence or by service contract agreement
 - Cardholders residing in Sioux County outside of public library service areas are assigned to a home library based upon Zip Code unless otherwise requested by the applicant
 - Cardholder accounts that are current and valid at the originating library have reciprocal borrowing privileges at all member libraries
- Ability for staff to interface with the existing cardholder account data
 - Access to searching cardholders across member libraries
 - Access to all cardholder records with control residing with home library
 - Access to cardholder information on problems, notes, blocks, fines and fees
- Ability to for both internal and external users to access the online library catalogs
 - Access to participating libraries' online library catalogs
 - Ability to place reserves and cancel requests
- Ability to incorporate automated routing and notifications based on agreed upon rules
 - Notifications to patrons remain with the transacting library where the material is checked out
 - Internal transit slips with destination library are automatically generated for each item transported via IA Shares
- Ability for borrowers to return all consortium materials at any participating library
- Agreement with the following collections parameters
 - Minimum participation requires 10% of circulating collection be available to consortium lending

- Special collections are restricted from circulation unless otherwise released by the lending library
 - Equipment
 - Library of Things
 - Local History
 - Reference
- Agreement with the following circulation rules
 - New materials are restricted from consortium lending for 4 weeks (28 days)
 - Local reserves are prioritized over FlexShare reserves
 - Reserve requests are delayed for four days to prioritize internal fulfillment of requests
 - Additional days may be added (1 per day) to reflect closings
 - Lending periods for all materials are for three weeks (21 days) with one renewal (21 days) dependent upon pending reserves

The individual libraries may operate independently using the following parameters:

- Individual libraries may participate in more than one FlexShare consortium
- Individual libraries may participate above the minimum 10% circulation minimum
- Reserves are pulled and processed according to internal procedures and schedule
- Transit times are dependent on staffing, and resources
- Blocks may be overridden at the discretion of the lending library
- Unlimited checkouts

4. Stakeholders

Stakeholders under this agreement include the following libraries and their respective municipalities:

- Sioux County Public Library Association
 - Sioux County Public Libraries
 - Alton Public Library (Granville)
 - Boyden Public Library
 - Hawarden Public Library (Ireton)
 - Hospers Public Library
 - Hull Public Library
 - Orange City Public Library (Maurice)
 - Sioux Center Public Library
 - Rock Valley Public Library
 - Rural Sioux County residents

The goal of this project is to formally implement public library lending relationships within the Sioux County Library Association and provide patron driven access to library materials within the county. The intended impact is to provide ease of access to information, materials, and services for all residents of the municipal libraries' service areas as well as residents of rural Sioux County. It is hoped that with increased access to collections, perceived barriers of access regarding area libraries and their services will be diminished or even eliminated. It logically follows in the collaborations already being implement in regards to programming.

As cardholders become more familiar with the options available through these models, distances lessen. This positively impacts library collections, programs and services. Libraries can continue to build on collections that serve each locally and rely upon the similarly curated collections of partner libraries without compromising breadth and depth of materials available to their cardholders. Gaps in hard to replace authors or series can be sourced for

borrowers or collection management purposes without compromising the integrity of individual libraries collections. Collaborative library resources management minimizes excessive duplication in card holder accounts and material collections, thus saving time and money for participating libraries.

Agencies otherwise impacted by this agreement are as follows:

- State Library of Iowa
 - IA Shares
 - SILO

The State Library of Iowa is very supportive of this project. It looks at this collaboration as a natural outcome of the IA shares courier system and a model for other libraries to follow. The initial impact on the IA shares courier service will likely be minimal. As use of the shared platform becomes commonplace more materials with transit through the system. The courier system is designed to accommodate large numbers of materials. Individual items are not tracked individually but rather collectively as consolidated shipments. This attribute minimizes the need for processing materials as opposed to ILL generated using the SILO platform.

SILO ILL requests are labor intensive. Materials are reviewed for purchase then passed on to ILL for processing if rejected. This requires multi-source searching, requesting, inter library communications, transit, and specific processing including technical services for each material request. SILO would then become supplementary services for the ILL request process as lending becomes directly customer driven.

5. Implementation Plan

Implementation of the project begins with approval of the proposal and ends in a public launch of the project. Action steps follow in the high-level timeline.

6. High-Level Timeline

- Review and modification of the draft proposal – July 25, 2022
- Approval and authority to proceed – August 25, 2022
- Soft launch - September 6, 2022
- Testing and training – September 6, 2022 through October 17, 2022
- Review and analysis of testing and training – October 24, 2022
- Revisions – October 24, 2022 through October 31, 2022
- Public Launch – November 1, 2022

APPROVAL AND AUTHORITY TO PROCEED

We approve the project as described above, and authorize the team to proceed.

Name	Title	Date