Marmot Membership, Services, and Governance

DRAFT 2016-04-08

Marmot Council 2016, Rifle, Colorado

This document outlines characteristics of Marmot members, services, and governance. It is intended to inform Council 2016 discussion of recent growth and plans for future growth

1. Marmot Members & Prospects – types of libraries, size, & territory

- Types of libraries: The following three tables highlight recent membership growth in 3 service areas: Union Catalog (Sierra), IT Services, and Discovery Partners (Pika). See Attachment 1 for a complete list of members and associate members.

Union Catalog Members (Sierra)	1985	2009	2015
Public	6	11	16
Academic	6	4	6
School	2	4	5
Regional Systems (Pathfinder, Three Rivers, Southwest)	3		

IT Service Subscribers	2009	2015
Public	9	10
School	1	1

Discovery Partners (Pika)	2009	2015
Public		3
Regional Systems (AspenCat, Flatirons, Nashville)		3

- Size
  - Medium-size Colorado libraries are "just right" for Marmot
  - Large Colorado libraries (Denver, JeffCo, CSU, etc.) have their own ILS
    - Most are in Prospector
    - All are Pika prospects
  - Small Colorado libraries use AspenCat AND Pika
    - 44 publics include Alamosa, Dolores County, Dolores, Mancos, Nederland, Norwood, Ouray, Silverton, West Routt/Hayden
    - 3 academics include CC Aurora, Red Rocks CC, Regis University
    - 26 school districts include Crested Butte, Gunnison, Silverton, West End/Naturita

- Territory
  - Colorado for Union Catalog members
  - Western Slope for IT Service subscribers
  - United States for Discovery Partners
- New members 2009-2015
  - 5 publics: Salida, Englewood, Rampart, Buena Vista, Pine River
  - 2 academics: CCU, Fort Lewis
  - 1 school district: Englewood
- Notable independents on the Western Slope (prospects?)
  - Cortez (Insignia)
  - Delta County (Symphony, 5 sites)
  - Durango (Millennium)
  - Ignacio (Insignia)
  - Moffat County/Craig (Follett)
  - Montrose RLD (Horizon, 3 sites)
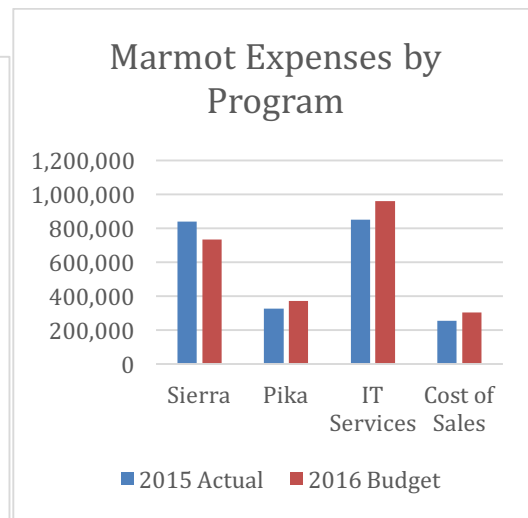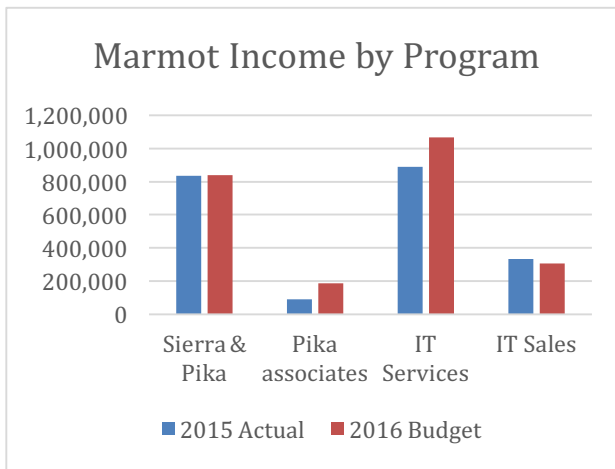 - Ridgway (Library.Solution)

2. Marmot Services

- Substantial Union Catalog (1.8M works) & shared ILS (Sierra by Innovative)
  - All 27 members use
  - Optional integration with Prospector & MOBIUS
  - Primary focus of User Services team managed by Brandon Cole
- Cost-effective IT services
  - 11 members subscribe
  - 1,124 workstations, 22 servers, 52 wireless access points, Internet service (58 circuits for 30 sites), E-Rate, etc.
  - Primary focus of IT Services team managed by Sean Hanson
- Excellent Discovery Layer (Pika by Marmot)
  - All 27 members plus 6 Discovery Partners use and help develop
  - Primary focus of Research & Development (R&D) team managed by Mark Noble
- Nascent Digital Archive
  - Development in 2016 is focused on Digital Archive program

3. Staff – who they are, what they do

- User Services: Brandon Cole (Manager), Lloyd Chittenden (Union Catalog Coordinator), Tammy Poquette (Library Systems Trainer), Nancy Lindwedel (part-time Union Catalog Tech)
- IT Services: Sean Hanson (Manager), JB Wiese (System Admin), Jason Stow (Senior Tech Support Analyst), Wes Addington (Tech Support Analyst), Aaron Brumbaugh (Tech Support Analyst)
- R&D: Mark Noble (Manager), Jordan Fields (Program Manager), Pascal Brammeier (Developer)
- Business Office: Mary Vernon (Business Manager)
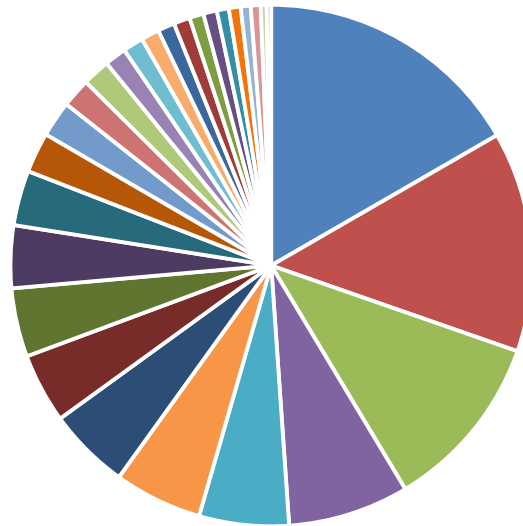
4. Pricing Principles

- Sierra and all "included" services
    - Pricing is largely based on staff sessions
    - SIP2 and a few other options are priced separately
    - Most inappropriate subsidies have been eliminated
    - Alternative pricing based on standard metrics was rejected in 2013
- IT services
    - Optional fee-based services for full members
    - Pricing is based on counts of workstations, servers, wireless access points, and DSL circuits
    - Broadband pricing needs overhaul for new technologies and E-Rate
- Pika
    - Included for full members
    - Discovery Partner income pays for 2nd developer
- Digital Archive pricing in 2016 based on session counts of 12 members in Cohort 1, but this should be rethought for 2017

5. Budget and Pricing Governance

- June – Marmot Director and management team draft budget & pricing
- July – Finance Committee reviews and recommends
    - Directors are invited to comment on posted drafts
- August – Marmot Board reviews and approves
- September – Marmot Director announces budget and prices to Director

Marmot income by member 2016 Budget

■ MCPLD	■ Garfield	■ EVLD	■ MCVSD51	■ Grand	■ Bud
■ Pitkin	■ Basalt	■ Delta	■ Wilkinson	■ Fort Lewis	■ Vail
■ Gunnison	■ Summit	■ Englewood PL	■ CMU	■ Adams	■ CMC
■ Pine River	■ Salida	■ Western	■ Rampart	■ CCU	■ Buena Vista
■ Aspen SD	■ SSSD	■ Englewood SD	■ PVSD		

6. Other documents that describe decision making structure

- Board: https://www.marmot.org/node/27
- Council: https://www.marmot.org/node/26
- Staff: https://www.marmot.org/node/13

7. Benefits and Responsibilities of Membership

Public, academic, and school libraries formed the Marmot Library Network in 1985 primarily to afford an integrated library system (ILS). When Marmot implemented patron-initiated system holds and a shared OverDrive collection in 2006, the object of sharing began to shift from ILS costs to library collections. And when Marmot joined Prospector in 2010, the primary reason to join (or remain part of) Marmot was not the ILS but a Union Catalog facilitating collection sharing.

- Benefits
    - Robust resource sharing among 27 members
    - Competitive ILS functionality (Sierra)
    - Excellent online catalog (Pika)
    - Talent sharing in committees and task forces

- o Shared e-collections: OverDrive and Zinio
- o IT Service options (IT expertise benefits all members)
- o Optional resource sharing with Prospector (CO, WY)
- o Optional resource sharing with MOBIUS (MO)
- Responsibilities
  - o Follow Union Catalog standards
  - o Share most physical resources
  - o Participate in committees and task forces
  - o Pay bills in a timely fashion

8. Strategies for Growth and Retention

- Marketing & sales efforts are limited to reputation, word-of-mouth, and conscientious responses to requests
  - o One email campaign in 2010 has not been repeated
  - o Ongoing conversations with prospects can take years to consummate
  - o 30 prospects received price quotes and follow-up from 2009 to 2015
- Member retention is due to great service at reasonable prices
  - o Price reductions in 2010 and 2011
  - o Fair cost-sharing models
  - o Excellent new employees

Attachment 1

Member Libraries

Member Libraries	LMS	OPAC	Regional ILL	Marmot IT	System links supported by Marmot
Adams State University	Sierra	Pika	Prospector & MOBIUS		OCLC
Aspen School District	Sierra	Pika			SkyRiver
Basalt Regional Library District	Sierra	Pika	Prospector	Yes 2016 Q1	OCLC
Bud Werner Memorial Library	Sierra	Pika	Prospector	Yes	OCLC, Boopsie
Buena Vista Public Library	Sierra	Pika			SkyRiver
Colorado Christian University	Sierra	Pika	Prospector & MOBIUS		OCLC, Summon
Colorado Mesa University	Sierra	VuFind	Prospector & MOBIUS		OCLC, EBSCO Discovery
Colorado Mountain College	Sierra	Pika	Prospector & MOBIUS		SkyRiver, EBSCO Discovery
Delta County Libraries	Horizon at SirsiDynix	Enterprise 4.3	SWIFT	Yes 2016 Q2	
Eagle Valley Library District	Sierra	Pika	Prospector	Yes	OCLC

Englewood Public Library	Sierra	Pika			SkyRiver
Englewood Schools	Sierra	Pika			SkyRiver
Fort Lewis College	Sierra	Pika & EDS	Prospector & MOBIUS		OCLC, EBSCO Discovery
Garfield County Public Library District	Sierra	Pika	Prospector	Yes	OCLC
Grand County Library District	Sierra	Pika	Prospector	Yes	SkyRiver
Gunnison County Library District	Sierra	Pika	Prospector	Yes	OCLC
Mesa County Public Library District	Sierra	Pika	Prospector	Yes	SkyRiver
Mesa County Valley School District #51	Sierra	Pika		Yes	OCLC
Pine River Library	Sierra	Pika			OCLC, Boopsie
Pitkin County Library	Sierra	Pika	Prospector	Yes	OCLC
Plateau Valley School District #50	Sierra	Pika			SkyRiver
Rampart Library District	Sierra	Pika			OCLC
Salida Regional Library	Sierra	Pika	Prospector		OCLC
Steamboat Springs School District RE-2	Sierra	Pika			SkyRiver
Summit County Library	Sierra	Pika	Prospector		SkyRiver
Vail Public Library	Sierra	Pika	Prospect	Yes	OCLC

				or	
Western State Colorado University	Sierra	Pika	Prospector & MOBIUS		OCLC, EBSCO Discovery
Wilkinson Public Library	Sierra	Pika	Prospector	Yes 2015 Q3	OCLC

Associate Members	LMS	OPAC	Regional ILL	Marmot IT	Special projects supported by Marmot
anythink (Rangeview Library District)	Horizon	Pika	SWIFT		Material Requests
Arlington Public Library	Sierra	Pika			
AspenCat	Koha at LibLime	Pika	SWIFT & AspenCat		union catalog
Flatirons Library Consortium: Boulder, Louisville, MDE-Broomfield, Longmont, Lafayette Sep 2016	Sierra at FLC	Pika	Prospector & MOBIUS		union catalog
Nashville Public Library Nashville Public Schools	Millennium L.SS	Pika			"Limitless Libraries"
Wake County Public Libraries	Horizon	Pika			