

**An Exploration and Evaluation of Consortia  
Opportunities for Albertsons Library:  
A Recommendation Report**

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## Abstract

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On September 12, 2019, Tracy Bicknell-Holmes, Dean of Albertsons Library and the library Collections Council appointed a working group of library faculty and staff to investigate and propose recommendations related to adding or expanding consortia participation. The Collections Task Force group began by exploring the related literature to identify industry trends and reviewing the broad range of available consortia and services. They then created a list of consortia that met the general criteria of eligibility and services that could loosely be called desirable or beneficial. In order to further reduce the long list of consortia, the Task Force conducted a needs assessment of library personnel consisting of an interview with the Library Leadership Team and a follow-up survey distributed to unit heads. The Task Force also spoke with the Dean of University of Idaho Library and the Associate Dean of Idaho State University Library. This resulted in a short list of eight potential consortia. Next, the Task Force used the results of the needs assessment to develop evaluation criteria that could be applied with relative objectivity to the consortia under discussion. Each consortium was assigned a numerical score that was used in conjunction with subjective factors such as the Task Force’s institutional knowledge and professional opinion of industry trends to determine which groups to recommend. Over the course of the Task Force’s investigation the world was radically, if temporarily, altered by the COVID-19 crisis. This both delayed the Task Force’s final recommendations and influenced potential decisions based on the shifts in the University and State budgets. Though financial factors were not intended to be the deciding factor in any recommendations, the Task Force believed it would be financially imprudent to submit the final report without incorporating concerns caused by the changes. In this report, the Task Force recommends expanding participation in one consortium, while joining two additional consortia. In addition, the Task Force recommended that one consortium be joined before submission of the final report. We believe that these consortia meet a wide range of library needs, particularly increased access to materials or professional development opportunities, but are also cost-effective.

Keywords: consortia, consortium, academic library, professional development, shared electronic purchasing, print journal repository, resource sharing

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## Executive Summary

To determine which consortia Albertsons Library should consider joining, Tracy Bicknell-Holmes, Dean, and the Collections Council, asked us to study available consortia, the services they offer, their cost effectiveness, and strengths, and weaknesses. They asked us to then submit our findings and recommendations.

Currently, Albertsons Library participates in multiple consortia offering a wide variety of services, including reciprocal interlibrary loan, shared electronic resource purchasing, professional development, and digital finding aid access. Staff knowledge of current partnerships is generally low unless the personnel work in a department such as Serials who have frequent access with a specific consortium. As part of our charge we found it necessary to provide shared definitions of consortia services and conduct an internal needs assessment to identify which services are most necessary and desirable for Albertsons Library.

To complete this study, we created a long list of consortia for consideration using institutional knowledge and available industry literature. We then conducted the previously mentioned internal needs assessment using interviews and surveys with stakeholders as well as with colleagues at other Idaho academic libraries. We used this information to develop an evaluation criteria rubric to assign each consortium a numerical score. This score was used in conjunction with our own subjective review to create our final recommendations.

In the process of composing our final recommendations, the COVID-19 pandemic crisis radically impacted the Boise State campus, and the world, causing our report to be delayed. This influenced our recommendations in two ways. Firstly, we more fully considered the cost of any potential consortia and slightly altered our recommendation for the highest cost consortia being proposed. Secondly, in order to take advantage of immediate cost savings, we recommended joining a consortium before submission of the final report.

Our main finding is that Albertsons Library would be best served at this time by utilizing multiple lower-cost, lower-risk consortia memberships that provide access to several different services, as opposed to joining one high-cost, higher-risk, all-in consortium. Faculty and staff within the library are very concerned about issues such as the time and effort involved in implementation and losses to local control over our catalog and purchasing. Many would like to see a fully-drafted change management plan before any all-in consortia are considered.

While being cognizant of current budget considerations, we recommend pursuing three consortia that offer professional development opportunities and print journal repository services in addition to the shared electronic purchasing consortium that has already been joined. We also recommend continuing the Collection Task Force's work into Phase 2 where we will pursue more information on larger partnerships and explore alternatives to paid access materials.

## Introduction

In order to assess the best course of action regarding new or expanded consortia partnerships for Albertsons Library, Tracy Bicknell-Holmes, Dean and the Collections Council, asked us to conduct a review of consortia options including:

- Identifying potential consortia and Albertsons Library's eligibility for these groups
- Looking specifically at Orbis Cascade Alliance for feasibility
- Determining if other consortia options should be investigated more thoroughly
- Providing a report on potential consortium options.

A second phase of the project will focus on investigating alternatives to paid access (see Appendix A).

Currently, Albertsons Library is a member of several opt-in consortia with varying degrees of participation and benefit. Continued materials inflation, sole source publishing, student population growth, and increases in Boise State University's Carnegie Classification have all contributed to critical budget concerns that have resulted in reduced access for the Boise State University community. In addition, Northwest Commission on Colleges and Universities (NWCCU) accreditor, Steve Hiller, recommended in his preliminary statements regarding continued accreditation that Albertsons Library consider more significant consortia agreements.

In order to address our charge, the Collections Task Force divided our work into six tasks:

- Review available literature to assess trends in library consortia. We performed secondary research to complete this task.
- Review Albertsons Library's current consortia participation and identify areas where we may not be fully utilizing resources. This task was completed with internal research.
- Determine available consortia, eligibility requirements, and strengths and weaknesses. We used secondary research to complete this task. We also interviewed current consortium members to understand their experiences with the consortium.
- Conduct an environmental scan of Albertsons Library to determine personnel needs and concerns regarding consortia. This task was completed with an in-person interview of the Library Leadership Team and a supplemental survey sent to all Albertsons Library Unit Heads.
- Establish and apply criteria for consortia evaluation. We completed this task using the knowledge gained in Tasks 1-4.
- Create recommendations for Albertsons Library consortia participation. This report represents the completion of this task.

We found that consortia are no longer easily defined and there are a large number of organizations providing a wide variety of services with differing levels of commitment, participation, and cost. Among Albertsons Library faculty and staff, the primary need identified was cost-efficient increased access to materials. Having the support of a network of professional library staff and the ability to influence regional or national practices were also

highly valued. The greatest concerns were increased workloads and change management for the units who would be heavily impacted within Albertsons Library. We also found there are systems concerns, particularly related to catalog clean-up, that would need to be addressed as part of this process.

Our principle finding was that it is unclear at this time whether membership in an all-in consortium would have sufficient return on investment to justify up-front costs. However, we also determined that there are several low-cost, low-risk options that could effectively continue the momentum started by the creation of the Collections Task Force in regard to consortia exploration. These options would demonstrate positive progress toward meeting the resource needs of Boise State, while allowing the library additional time to perform a thorough cost-benefit analysis of larger consortia memberships, establish a change management plan that identifies and addresses internal operations that must be performed before an all-in consortium could be joined, and conduct a review and assessment of alternatives to paid access.

We recommend a three-phased approach.

Phase 1: Albertsons Library pursues membership in three new consortia that are lower-cost, lower-risk, and increases participation in a fourth consortium to which Albertsons Library already belongs.

Phase 2: Consists of concurrent tasks executed by the Collections Task Force, but delegated to small subgroups of members.

Phase 2, Task 1: The group performs a cost-benefit analysis of four consortia that are higher-cost, higher-risk, all-in, or have an unclear benefit to Albertsons Library under the criteria established by the Collections Task Force and develops a change management plan for effective implementation of any recommended consortia.

Phase 2, Task 2: A group explores and assesses alternatives to paid access as outlined in the original Collections Task Force charge.

Phase 3: The results of Phase 2 are effectively implemented or a new charge is developed if it is determined there are no actionable results from Phase 2.

In the report that follows, we outline additional details of our research process, our results, and our conclusions based on those results, as well as a more detailed description of our final recommendation.

## Research Methods

We began our research by meeting with the Collections Council to review the charge document, clarify scope, and affirm expectations. Dean, Tracy Bicknell-Holmes emphasized that monetary resource allotment was out-of-scope for the Task Force and while cost might be a consideration in our recommendation it should not eliminate any potential options. Theoretical services, such as creation of a new consortium, were also considered out-of-scope for the initial review, but could be considered part of the subsequent exploration into alternatives to paid access.

As the Task Force began to look critically at library consortia and specifically at the Orbis Cascade Alliance, it became clear that it was not easy to define consortia as a single type of organization or identify whether a particular consortium would be successful in meeting Albertsons Library's stated need of increased access to materials at a reduced cost.

To perform the analysis requested by the Collections Task Force, our activities organically developed into five research tasks and a sixth task in the form of this final report:

Task 1: Review available literature to assess trends in library consortia

Task 2: Review Albertsons Library's current consortia participation and identify areas where we may not be fully utilizing resources

Task 3: Determine available consortia, eligibility requirements, and strengths and weaknesses

Task 4: Conduct a needs assessment of Albertsons Library to determine personnel needs and concerns regarding consortia

Task 5: Establish and apply criteria for consortia evaluation

Below we discuss how each task was performed and the reasoning that guided our methods.

### *Task 1: Review available literature to assess trends in library consortia*

There are many scholarly articles available regarding academic libraries and consortia. As Task Force members had varying levels of familiarity with consortia, our intention was to increase overall knowledge, identify industry trends, and, if possible, locate best practices for assessing or joining consortia. Many of the articles we read fell into one of four categories:

- A survey of consortium or consortia services
- Implementing or migrating an integrated library system (ILS) as part of a consortia
- Innovative consortia services
- A survey of the consortia environment, that is prevalence, influence, return-on-investment, or trends

Additional topics included, closing a consortium, creating or maintaining a consortium, specific consortium procedures, joining a consortium, and comprehensive monographs on consortia. While we were disappointed that there was not greater coverage of assessing or joining consortia from the perspective of large academic libraries to help guide our process, we were able to identify common consortia services, benefits, concerns, and identify industry trends. We relied most heavily on articles written by consortia founders or directors (Chadwell, 2011; Machovec, 2015; Machovec, 2017).

*Task 2: Review Albertsons Library's current consortia participation and identify areas where we may not be fully utilizing resources*

In December, 2017 Dean Bicknell-Holmes, in coordination with Dean Baird (University of Idaho), Associate Dean Hunter (University of Idaho), Dean Bridges (Idaho State University), Associate University Librarian Shropshire (Idaho State University), and Director of Library Services Bjork (Lewis and Clark State College) developed a document to inform the Idaho State Board of Education of current consortia or collective buying agreements in which Idaho public, academic libraries engage. This document also served to inform Task 2. It was supplemented by the institutional knowledge of Collections Task Force members and staff in the Acquisitions and Collections unit. Knowledge of services available through Lyris was supplemented by an in-person presentation by Lyris representative, Andrew Gardner on February 24, 2020.

*Task 3: Determine available consortia, eligibility requirements, and strengths and weaknesses*

Collections Task Force member, Nancy Donahoo, primarily undertook the task of analyzing consortia availability and eligibility. She began with the International Coalition of Library Consortia (ICOLC) Participating Consortia list (International Coalition of Library Consortia, n.d.). Most consortia were eliminated based on geographic requirements (i.e. the library must be located in a specific state) or scope (i.e. public libraries only). A spreadsheet of potential consortia was created and additional information was developed<sup>1</sup>. This included:

- Qualifications with background
- Initial and ongoing requirements for full membership
- Membership
- Governance
- Levels of participation for institutions and individual staff

This information was not fully available online for all consortia considered, however in most cases information was sufficient to determine eligibility and potential benefit to the library. As part of this process, we also interviewed Dean Ben Hunter, University of Idaho (see Appendix B), and Associate Dean and Associate University Librarian for Collections Services Sandi Shropshire, Idaho State University<sup>2</sup> (see Appendix C), to explore their consortia use, particularly University of Idaho's full membership in the Orbis Cascade Alliance. These interviews were conducted via Zoom video conference on January 20, 2020 and December 10, 2019 respectively.

*Task 4: Conduct a needs assessment of Albertsons Library to determine personnel needs and concerns regarding consortia*

At the initial launch meeting on September 12, 2019, the Collections Task Force was made to understand that cost effective access to materials was likely the most important need that a consortium could serve, however the Task Force felt we could not sufficiently judge the strengths and weaknesses of the consortia under review without a fuller understanding of the needs of units throughout the library. In order to assess this information, we began with an in-

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<sup>1</sup> This spreadsheet was too large to be included in this report, even as an appendix. A copy is available to Collections Council on request.

<sup>2</sup> As of April 6, 2020, Sandra Shropshire now serves as Dean of University Libraries for Idaho State University.



person interview of the Library Leadership Team held January 23, 2020. The purpose of this interview was to gauge high-level perceptions of library wants and needs, as well as concerns regarding new consortia partnerships. The interview script appears in Appendix D and the Consortial Service and Shared Definitions document provided to participants prior to the meeting appears in Appendix F. After reviewing responses from the Leadership Team interview, we developed and distributed a supplemental survey to all library unit heads and interim supervisors (see Appendix E). This survey took a more unit-centered approach to assess what individual departments and staff considered important as well as to identify any initial barriers to change management such as unfamiliarity with current consortia practices or partnerships. The supplemental survey was distributed January 29, 2020 and unit heads were asked to respond by February 7, 2020, with an understanding that unit heads could request more time if needed.

*Task 5: Establish and apply criteria for consortia evaluation*

The Task Force initially attempted to develop evaluation criteria based on our literature review. This would have included a list of potential consortium services with an analysis of the strengths, weaknesses, and additional considerations. It was determined, however, that this sort of approach did not adequately consider whether criteria were strengths or weaknesses for Albertsons Library as opposed to the general idea of the service. For instance, Electronic Resource Sharing may have apparent strengths such as decreased costs or apparent weaknesses such as loss of local contract control, but this does not assess whether Electronic Resource Sharing is a strength for Albertsons Library.

In order to correct this discrepancy, results from the Task 4 needs assessment were cross-referenced with the literature review to create an evaluation criteria rubric (Appendix G). The resulting list groups criteria by the most commonly mentioned categories from the two needs assessment surveys. The criteria within each category are color-coded as Fair, Good, or Excellent based on whether they were most often considered positive or negative during the surveys. Within one category, multiple criteria, one criterion, or no criteria may be marked. A Fair mark subtracts one point from the overall total, a Good mark adds one point to the overall total, and an Excellent mark adds two points to the overall total. Attempts were made to incorporate parallel language within the criteria so that this weighting does not bias results. For example, under the category "Cost" there are four criteria based on cost transparency:

- Cost is unknown and requires negotiation (Fair)
- Cost is unknown, but is a set rate based on library budget (Good)
- Cost is known and exceeds \$5,000 annually (Good)
- Cost is known and is \$4,999 or less annually (Excellent)

The intention is that every consortium would fall into only one of these categories. This sort of discreet answering was not always possible in cases where the criterion was considered a net negative, but its inverse was not considered a net positive. For example, under "Time - Ongoing Participation" the criterion "More than a 1-Year Contract" is considered Fair and would therefore decrease the overall score. However, its inverse, "Annual contract," is considered the standard and not a value-add, so it is not included within the Good or Excellent criteria. This

prevents our evaluation criteria from being a strictly parallel rubric, but also allows us to focus on what is truly beneficial to the library.

It should be noted that the final rubric scores were not the only deciding factor in our recommendations. While the rubric provided an objective way to examine our options, similarity to other considered consortia, unknown and negotiated membership costs, incalculable cost savings or benefits, and ease of joining were all considered subjectively in determining whether a consortium was recommended for adoption or tabled for additional discussion and exploration.

## Results

In this section, we present our results, highlighting the data that most greatly impacted our recommendations.

### *Task 1: Review available literature to assess trends in library consortia*

Though there have been several consortia that have restructured or disbanded (Dean, 2016; Nesta, 2019), consortia have remained an integral part of collaboration among all types of libraries. In particular, academic libraries have used consortia as a means of cost effectively accessing materials either through shared catalogs, shared purchasing, or resource sharing (Machovec, 2017). However, as Machovec (2017) describes, when consortia participation is used as a cost-reduction measure there is always the risk that the consortium itself becomes a financial liability. He writes, “Non-critical or less efficient collaborations may be reduced while those activities that directly improve the services and fiscal situation of partners may actually increase” (p. 584). Similarly, Arch and Gilman (2017) describe the ways in which consortia have tried to respond to the changing needs of academic libraries writing, “...as academic libraries increasingly look beyond financial value and seek to demonstrate impact on institutional priorities and student outcomes, consortia must evolve to provide services that support those goals” (p. 250). Whereas Machovec (2015) describes more traditional services, such as electronic resource licensing and courier services, Arch and Gilman discuss newer models. This includes collaborative work, that is, working with other consortium members as an inherent benefit, as well as accessibility, digital and open content, and tools for teaching and learning.

The abundance of literature that focuses on ILS adoption, migration, or maintenance as a facet of consortium membership (Bullock, 2019; Conor & Ostergaard, 2017; Galbreath, Johnson, & Hvizdak, 2018; Liu & Fu, 2018; Romaine & Wang, 2017) would suggest that this is an area that should not be underexplored as part of the evaluation process. As Bullock (2019) outlines:

Greater collaboration has also meant a loss of autonomy in some areas...Libraries are better able to take advantage of technical services work performed by other CSU libraries, but a shared catalog has also meant that duplicate records often appear in the discovery tool. Primo has options for handling those duplicates, but those options also sometimes lead to undesired merging of records for different resources. A browser-based system is available on any computer, but that leads to strange glitches that have to be addressed by clearing the browser’s cache and cookies somewhat frequently (p. 114).

Such a large and costly investment in terms of both funding and staff time, requires effective assessment, however as Chadwell (2011) describes, assessment of consortium benefits can often be problematic and traditional cost benefit analysis (CBA) or return on investment (ROI) measures may be inappropriate especially due to the indeterminate nature of the outputs. Library consortia scale influence and capacity, however “rightscaling,” or the “optimum size of a group” must always be a consideration (Dempsey, 2018, February 28). As Schonfeld (2019) writes, “One of the great challenges facing academic library leaders is their understandable desire that their collaborative vehicles stay in sync with changes in their own objectives and the broader context in which they operate” (p. 2). There is great value in consortia and other

“collaborative vehicles” (Schonfeld, 2019), but this value may be difficult to articulate or may have limited benefit to various stakeholders.

*Task 2: Review Albertsons Library’s current consortia participation and identify areas where we may not be fully utilizing resources*

Our review showed that we currently have moderate participation with state and national consortia for a variety of services. These services include, physical courier delivery, grants and scholarships, reciprocal interlibrary loan, shared digital library, cooperative purchases of electronic content, and staff development and workshops. Albertsons Library currently participates in the following consortia:

#### Idaho Commission for Libraries (ICfL)

- Libraries Linking Idaho Databases (LiLI-D)
  - LiLI-D is a collection of K-12, career, and general interest databases available to all residents of Idaho at no charge. Albertsons Library has a special agreement with ICfL to allow all Boise State users to access LiLI databases regardless of location and to capture unique usage data for our patrons. Normally, out-of-state IP addresses are blocked.
- Libraries Linking Idaho (LiLI) Express
  - LiLI Express allows patrons to borrow from all member libraries in Idaho when they are traveling or otherwise away from their home library. Our Special Borrowers Card fulfills the sharing expectations for membership in this group. University of Idaho is the only other academic library member of LiLI Express.
- Library Leadership Advisory Committee (LiLAC) and other professional development
  - LiLAC creates frameworks for leadership development in Idaho librarians and provides continuing education and professional development opportunities.

#### IEEE Statewide Agreement

Albertsons Library purchases its subscription to IEEE (Institute of Electrical and Electronics Engineers) Xplore through a statewide purchasing agreement managed by University of Idaho.

#### Lyrasis

Albertsons Library is a member of Lyrasis, a non-profit membership organization that provides content and digital services to archives, libraries, and museums, and uses it to purchase electronic subscriptions such as Springer/Nature e-journals.

#### Orbis Cascade Alliance - Affiliate Member

Orbis Cascade Alliance has three programs available to affiliate members: Electronic Resource Licensing (Shared Content), Archives and Manuscript Service (Unique and Local Content), and Courier Service (Resource Sharing and Fulfillment). We participate in Electronic Resource Licensing to purchase subscriptions at discounted rates. This includes our subscription to RDA Toolkit. Special Collections and Archives (SCA) is a member of Archives and Manuscripts in order to participate in Archives West for online access to finding aids and to pay for LibraryHost hosting of ArchivesSpace.

### LYNX! Consortium Courier Service

Though Albertsons Library is not a member of Lynx Consortium, a group of 12 public Treasure Valley libraries with a shared catalog, we are included on the LYNX! Courier route in order to support interlibrary loan services with member libraries.

### Reciprocal Interlibrary Loan Agreements

Albertsons Library has signed reciprocal agreements with 261 libraries representing 46 states, the District of Columbia, and Denmark. Under these agreements we agree to waive our standard lending fees in exchange for the partner library waiving their standard lending fees. Per internal data, in 2019 89% of our Interlibrary Loan borrowing transactions were conducted with reciprocal partners.

### *Task 3: Determine available consortia, eligibility requirements, and strengths and weaknesses*

The result of the review of the ICOLC Participating Consortia list was a long list of 12 consortia with widely variable services and membership requirements. An additional three consortia were removed based on further investigation that revealed geographic requirements. The Statewide California Electronic Library Consortium (SCELC) was added at this stage when it was established that libraries do not have to be in California to join. The Colorado Alliance of Research Libraries (CARL) was removed after a phone conversation with CARL Executive Director, George Machovec. Machovec explained that while CARL does not have geographic restrictions and includes Wyoming libraries, it is primarily designed to serve Colorado libraries and he was concerned about adequate expectations for courier delivery. It would therefore not fit our purposes. The resulting short list of nine consortia was presented in the Performance Reporting sent November 22, 2019. Subsequent to the Performance Reporting, the Greater Western Library Alliance (GWLA) was also removed from the short list. Task Force members attempted repeatedly to assess our financial eligibility as GWLA requires “The applicant library falls within the top 75% of the current GWLA membership in at least one of the following two measures: 1) Annual library materials expenditures; 2) Number of staff as measured by student enrollment (Staff/FTE)” (Greater Western Library Alliance, 2015). We could not get the consortia to respond and our assessment of current members convinced us that we would not meet this eligibility requirement.

In our interview with Dean Hunter, January 7, 2020 (see Appendix B) we learned that in addition to being a full member of Orbis Cascade Alliance, University of Idaho is a small archive holder member of Western Regional Storage Trust (WEST). They find this consortium beneficial and not overly burdensome in terms of work or cost. Prior to joining Orbis Cascade as a full member, they were affiliate members. They believed that full membership would be beneficial based on their proximity to Washington State University, another Orbis Cascade member, and the dramatic increase in the available materials. When University of Idaho joined Orbis Cascade, the consortium did not mandate use of Alma/Primo, but University of Idaho was part of the migration to the new platform. It was conducted in four cohorts and the pricing system is quite complex based on resources, allocations, and full-time equivalents, so it is difficult for us to infer judgements about the potential costs based on University of Idaho’s experience. Before

joining Orbis Cascade, University of Idaho was part of the now disbanded Washington-Idaho Network (WIN) consortium, which helped cushion the transition to Orbis Cascade. Library staff were already used to some level of consortia-related loss of local control. Library users were easy to get on board due to the selling point of access to an additional 20 billion materials. Though they saved money overall through full membership, the buying club model for eResources is not as effective as it used to be and Dean Hunter does not see this increasing in usefulness going forward. In terms of preparation, Dean Hunter recommends making sure the catalog is cleaned in anticipation of a migration including accurate OCLC numbers, scrubbing out bib numbers, and reviewing our MARC 035 field. University of Idaho used laptops running third-party macros to do a large portion of their cleanup. In terms of future collaborations, Dean Hunter is open to larger partnerships with Boise State, particularly in the area of Open Educational Resources (OER).

In our interview with Associate Dean Shropshire, December 10, 2019, (see Appendix C) we confirmed that Idaho State University is an affiliate member of Orbis Cascade, but is not a part of any consortium that requires a shared ILS. They did look into membership in the Mountain West Digital Library (MWDL), but they did not join, likely because they do not have a large enough collection of unique materials. They are not considering full membership in Orbis Cascade at this time, in part because they have had very negative experiences with Ex Libris and will not migrate to Alma. At the time of the interview, they had migrated to the Sierra ILS, an Innovative Interfaces product that was recently purchased by Ex Libris. They find this ILS very nimble, but have experienced some issues with service request turnaround times. Regarding in-state collaborations, Associate Dean Shropshire believes Idaho State is interested in purchasing materials in whatever cost-effective way they can, but there is confusion at the State Board of Education level about the differences between the universities' needs and purchasing structures. Associate Dean Shropshire tries to be prepared to discourse on collective purchasing at any time in order to help educate stakeholders. In light of budget issues, Idaho State is exploring canceling index products that do not contain full-text resources, even though some of these databases are well-respected academic standards.

After compiling this wealth of information, we reduced the initial long-list of consortia to the short list that is the subject of our final report. The final short list includes (in alphabetical order):

- Amigos Library Services
- Center for Research Libraries (CRL)
- Council on Library and Information Resources (CLIR)
- Digital Library Federation (DLF)
- Lyris Learning
- Orbis Cascade Alliance
- Statewide California Electronic Library Consortium (SCELC)
- WEST: Western Regional Storage Trust

*Task 4: Conduct a needs assessment of Albertsons Library to determine personnel needs and concerns regarding consortia*

In attendance at our Library Leadership Team (LLT) interview on January 23, 2020 were LLT members Michelle Armstrong, Bill English, Cheri Folkner, Mary Aagard, Jaque Johnson, Georgann Kurtz-Shaw, and Cheryl Oestreicher, Collections Task Force Members, Heather Grevatt, Beth Brin, and Nancy Donahoo, and Amy Vecchione and Elisabeth Shook who fall into both categories.

Unit heads who responded to the supplemental survey included Jaque Johnson, Elisabeth Shook, Cheri Folkner, Cheryl Oestreicher, Mary Aagard, Ash Whitwell, and Georgann Kurtz-Shaw. For knowledge management purposes, a timely copy of the Albertsons Library Organization Chart is available in Appendix H.

Responses from the interview were loosely coded based on implicit or explicit reference to services outlined in the Consortial Services and Shared Definitions document and thematic statements. For example, references to catalog maintenance needed prior to an integrated library system migration were coded as "Preparation" as were comments about the need for a fully written change management plan. In this way, trends and the rates at which they appeared were identified. The same process was used for the Supplemental Survey and the results were incorporated into the Evaluation Criteria. Summaries for each of the emergent categories are included below. As respondents were told results would only be used in aggregate, no direct quotes have been included.

### Services

Generally, LLT and unit heads were interested in consortia services that increased patron access to collections or provided improved staff access to professional development, grants, scholarships, or best practices support. There was an equal emphasis placed on consortia that had an obvious patron benefit, such as those that would provide new or continued access to a database, and consortia that provide an obvious staff benefit, such as those that offer learning opportunities. Except in regard to a print journal repository, there was a noticeable preference for digital resources, both patron and staff focused, rather than for services like a physical courier or reciprocal faculty borrowing. Concerns over a loss of local control or decision making were reflected in services that were identified as less desirable.

### Cost

Cost was a significant concern among respondents. While participants understood that there may be a need for upfront investment, there was a strong desire to have calculable benefits fully assessed before committing to any all-in or higher-risk consortia. Experiencing actual cost savings was regarded as a main goal.

### Time - Implementation and Time - Ongoing Participation

There were strong concerns about the time it would take to implement or participate in a consortium and how that would be balanced against any net benefit. There was a clear preference, at this time, for consortia that could be implemented quickly and would not require excessive new commitments on staff time.

### Workload

There was great concern among all unit heads, not just those whose units were most likely to be impacted, with disproportionate impacts to staff workloads. Several respondents highlighted the need for a thorough assessment of who would be responsible for aspects of participation, whether job descriptions could be impacted, and if reorganization or changes to job descriptions would be necessary.

### Preparation for Implementation

Due in part to concerns about return on investment, there was little interest in consortia that would require significant preparation prior to implementation. This preparation could include catalog maintenance, cost/benefit analysis, migration to a new ILS, or staffing assessments. There was greater interest in identifying and progressing on these types of preparations independent of any consortia decisions. For example, if there are problematic catalog records, they should be fixed regardless of whether a consortium membership necessitates the fix.

### Training

Generally, respondents were not against consortia that required some level of training, but there were concerns that the training be free or low-cost and readily available. Specifically mentioned training related either to complex technical tasks, such as data migration that would require staff upskilling, or change management skills. There were also concerns about knowledge retention or knowledge management for continuity of operations.

### Local Control

Respondents showed clear concerns about losses of local control in relation to collection development, technical services including cataloging, and staff time. While respondents were willing to lose some local control to receive the benefit of centralized support for some technical service maintenance items, such as MARC tag table updates, this would only be an option in consortia that utilize a shared ILS. Concerns for staff time mostly related to committee requirements.

### Patron Benefit

As previously mentioned, participants placed nearly equal value on patron and staff benefits and were willing to consider consortia that might only directly serve one of these populations. The most frequently mentioned patron benefit was improved access to materials. There was also a desire to make sure patron benefits could be easily communicated. Paraphrasing one respondent, if the benefit does not make the patrons' life easier or their access faster and more convenient, it will be hard to convince them it is a benefit.

### Staff Benefit

Respondents were very egalitarian in their desire to see a staff benefit, with an interest in professional development opportunities that could benefit many or all units equally. In addition to practical learning, such as webinars and workshops, there was also enthusiasm for the less



tangible idea of improved professional voice or influence. That is, there was a desire to see faculty and staff better able to participate at the regional and national level in relation to best practices development, networking, and service.

*Task 5: Establish and apply criteria for consortia evaluation*

Though the evaluation criteria summative score, or total, was not the only consideration while evaluating the potential consortia, it did provide an objective measure to demonstrate the potential benefit of a consortium versus staff concerns that were applicable to that particular organization. Scores were calculated in this way:

Fair	Good	Excellent	Total
1 point per criterion met	1 point per criterion met	2 points per criterion met	Excellent + Good - Fair

For example, if a consortium met 1 Fair criterion, 1 Good criterion, and 1 Excellent criterion their final score would be 2 or  $(2+1-1=2)$ . This arrangement means it is possible for a consortium to receive a 0 or even negative score. The score and relevant comments for each potential consortium is summarized below. The Collections Council may review the full spreadsheets on request:

Amigos Library Services

Score:

Fair	Good	Excellent	Total
2	8	20	26

**Strengths:** Amigos offers several desirable services such as professional development and cooperative purchase of electronic resources. Participation would not be overly difficult or time consuming.

**Weaknesses:** The cost is unknown, though it is based on the library budget. It is unclear whether we would be eligible for all services, such as courier, because of geographic restrictions; Amigos is primarily located in the Midwest. If we are not eligible for all services, it is unclear whether membership would be cost effective.

Center for Research Libraries (CRL)

Score:

Fair	Good	Excellent	Total
0	4	14	18

**Strengths:** CRL has a very unique set of collections and supports services to develop and maintain those collections. Though not strictly a print journal repository, they operate in a similar fashion. Participation could be incorporated into current workflows and it does not appear it would take significant time.

**Weaknesses:** The CRL collections may not have wide appeal so it is unclear how immediate and communicable the patron benefit would be. Though the cost can be calculated, it is fairly high. CRL offers a new member incentive program that requires a three-year commitment and would cost an estimated \$34,000 over those first three years. If we elected to use a one-year contract, we would pay an estimated \$17,130 for the first year.

#### Council on Library and Information Resources (CLIR)

Score:

Fair	Good	Excellent	Total
2	6	16	20

**Strengths:** CLIR offers unique scholarships and grants as well as professional development, primarily focused on increasing capacity for digital collections and digital humanities. The cost is reasonable at \$5,000 per year and would result in a \$1,750 annual membership savings for DLF.

**Weaknesses:** CLIR is not really a cost-saving measure and their professional development may be more narrowly focused than some other consortia. Staff would need to actively participate in order to achieve the maximum membership benefit and there is no direct patron benefit.

#### Digital Library Federation (DLF)

Score:

Fair	Good	Excellent	Total
2	4	18	20

**Strengths:** Though narrowly focused, DLF provides strong professional development and participation conveys a certain level of regional/national recognition. The cost is reasonable at \$6,750 per year.

**Weaknesses:** There is little direct patron benefit and staff must actively participate in order to receive the maximum membership benefit.

Lyrasis Learning

Score:

Fair	Good	Excellent	Total
1	2	20	21

**Strengths:** Lyrasis Learning is low cost at \$2,000 per year. It builds on an existing membership and would require very little time or work to incorporate into current workflows. Staff will need to actively participate to receive the maximum membership benefit, but participation in Lyrasis Learning will likely take less commitment than DLF.

**Weaknesses:** Like DLF, Lyrasis Learning has a fairly narrow benefit and it is unclear how widely their professional development will appeal to faculty and staff in multiple units. As a strictly professional development service, there is no direct patron benefit.

Orbis Cascade Alliance

Score:

Fair	Good	Excellent	Total
16	6	10	0

**Strengths:** Orbis Cascade offers a large number of services, though not all of them were highly prioritized during our needs assessment. There is strong potential for patron benefit and eventual cost savings, though calculating these benefits may be challenging.

**Weaknesses:** As an all-in consortium, Orbis Cascade would have a lengthy and involved implementation process that would disproportionately impact units in technical services. The cost to join is unknown and would require meeting and negotiating with consortium staff. The cost and implementation would include full migration of our integrated library system.

Statewide California Electronic Library Consortium (SCELC)

Score:

Fair	Good	Excellent	Total
0	3	21	24

**Strengths:** SCELC provides cooperative purchase of electronic resources using an opt-in model. The cost of affiliate membership is unknown, but it is incorporated into the cost of selected subscriptions at a standard rate. It is anticipated that even with this charge, the cost of some subscriptions will go down.

**Weaknesses:** As a public institution, we are not eligible for full-membership.

WEST: Western Regional Storage Trust

Score:

Fair	Good	Excellent	Total
3	9	8	14

**Strengths:** WEST is a print journal repository that provides reciprocal interlibrary loan for collections that are part of the archive. WEST has the potential to result in space recovery, though this would not likely occur for several years until we were established in our membership and sure that we would not lose material access.

**Weaknesses:** The cost for WEST is a bit high at an estimated \$26,000 over three years. WEST requires three-year contracts in order to maintain continuity. While WEST may provide some additional material access, this would be difficult to calculate and is not expected to be the primary benefit.

## Conclusions

### *Trends in Library Consortia*

Consortia remain a valuable element of organized library cooperation providing a wide range of services. They are a field in transition however, with some groups shifting toward an emphasis on the collaborative work of a consortium as the primary benefit, while others remain more rooted in traditionally offered services that use leveraged buying power and coordination to provide patrons with access to materials at a more affordable cost.

### *Current Albertsons Library consortia participation*

Albertsons Library participates at varying levels with several consortia which provide a multitude of different services. Many of these services, such as reciprocal Interlibrary Loan, have clear and measurable benefits to patrons and staff. Current consortia partnerships are incorporated into workflows and do not unduly limit local control over collection development, technical services decisions, or staff committee work. While some individual consortia work has been assessed, such as Interlibrary Loan, this report seems to be the first time, recently, that an attempt has been made to evaluate our current partnerships as a collective to identify gaps and explore other options.

### *Available consortia, eligibility, and requirements*

Though thousands of library consortia exist, the actual number of viable consortia for Albertsons Library is relatively small. Due to restrictions based on geography, budget, and scope, as well as what needs the library is attempting to meet by joining into new partnerships, we were able to identify a moderately-sized group of potential candidates. From there we were able to refine the list down to eight final options. These options range in cost from \$2,000.00 annually to an estimated \$17,000 annually, with two consortia whose price is unknown at this time. Though we are at least partially eligible for all final consortia, the degree to which we can participate is sometimes impacted by our physical location relative to the region the consortia are designed to serve or our status as a public, academic library. The level of participation also differs dramatically, with some consortia having no specific requirements, while others mandate expansive committee involvement.

### *Albertsons Library personnel needs and concerns*

While Albertsons Library faculty and staff are very concerned about access to necessary resources and are eager to identify ways to maintain or provide additional materials through cost-effective purchasing, sharing agreements, and more, they are also sensitive to the time and energy that is usually required to secure this access. They are also keenly aware of our institution's unique needs and a desire to keep a high level of local control over many aspects of collection development and technical services. We took these concerns very seriously in our consideration of available consortia, which ultimately led to crafting evaluation criteria that reflected both needs and concerns, weighing them almost equally. This was also in response to a strong emphasis on the need for excellent change management highlighted as a primary desire of most unit heads. Unit heads in public and technical service areas asked for thorough and strategic planning regardless of the recommendations made by the Task Force.

*Criteria for consortia evaluation*

A system of evaluation was established to incorporate the feedback obtained during the needs assessment. This system provided an objective score to help analyze consortia based on whether the elements of services provided, cost, time and work needed for implementation, etc. were considered more or less desirable. Scores ranged from 0 to 26 with a mean score of 18 and a median score of 20, seeming to indicate that most of the consortia selected are well-suited to meet the library's current needs and that the zero score is an outlier. We believe this supports a continued review of the consortia that we are not recommending joining at this time. As the score was not used in isolation, but was part of a larger conversation, some aspects of membership, such as cost, that might disqualify a consortium at this time, would not preclude joining in the future.

## Recommendation

The Collections Task Force recommends a three-phase approach to continuing work regarding consortia:

**Phase 1:** Albertsons Library pursues membership in three new consortia that are lower-cost, lower-risk, and increases participation in a fourth consortium to which Albertsons Library already belongs.

### Digital Library Federation

The Collections Task Force recommends joining the Digital Library Federation at a cost of \$6,750 for a 1-year contract. This membership should be coordinated with an active campaign to make library faculty and staff aware of the new opportunities provided by joining and by supporting participation in those groups. We encourage the library to track staff participation in the program and compare the cost to the benefit prior to renewing for a second year

### Lyrasis Learning

We recommend expanding our participation in Lyrasis to include the Lyrasis Learning platform at a cost of \$2,000 for a 1-year contract. We encourage the library to track staff participation in the program and compare the cost to the benefit prior to renewing for a second year. We also recommend encouraging staff to take greater advantage of opportunities available through our current membership, such as the annual conference and catalyst fund.

### Statewide California Electronic Library Consortium<sup>3</sup>

We recommend joining the Statewide California Electronic Library Consortium as an affiliate member in order to utilize their shared purchasing of electronic content, particularly for resources to which we already subscribe. We suggest that any cost savings accrued here may be utilized to help offset costs related to other partnerships. As the cost of membership is incorporated into the cost of subscriptions, we recommend joining for the duration of any beneficial contracts and leaving if or when the purchasing is no longer cost effective.

### Western Regional Storage Trust

We recommend joining the Western Regional Storage Trust as a Bronze level Archive Holder for an estimated cost of \$26,000 for a 3-year contract. It will be necessary to work with the Office of General Counsel prior to joining in order to ascertain our ability under state law to fully participate by gifting titles to other archives. We can receive gifts of titles from other institutions

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<sup>3</sup> Our final report was delayed due to COVID-19 and subsequent campus closures. In light of this, we elected to send an internal memo (see Appendix I) to the Collections Council, recommending permission to join SCELIC as an affiliate member before submission of the final report. This memo was sent Monday, April 13, 2020 and outlined the potential benefits and minimal risks of such an action. On April 27, 2020 our affiliate membership application was accepted and we have already transferred our subscription of BioOne Complete to SCELIC. We have also identified an unanticipated benefit in the form of a potential reduction in staff workload. As SCELIC license agreements are pre-negotiated, this results in time savings for every subscription that is completed through SCELIC and will not need to be negotiated with the individual vendor as it is now.

under current policies. We advise that the library keep comprehensive statistics of use and compare our own holdings against archive holdings during this time in order to determine if the partnership is beneficial and should be renewed. We do not recommend discarding any titles in response to the partnership during this time in case the partnership is not renewed. In light of COVID-19 we realize that University budgets may no longer support this recommendation for the 20/21 fiscal year. In the event that our recommendations cannot be fully utilized, we advise membership in WEST be delayed until a more fiscally stable period, while continuing to assess the WEST holdings for their potential benefit in space reclamation.

**Phase 2:** Consists of concurrent tasks executed by the Collections Task Force, but delegated to small subgroups of members. We ask that an additional member be appointed in place of Beth Brin subsequent to her retirement.

Phase 2, Task 1: The group performs a cost-benefit analysis of four consortia that are higher-cost, higher-risk, all-in, or have an unclear benefit to Albertsons Library under the criteria established by the Collections Task Force and develops a change management plan for effective implementation of any recommended consortia.

#### Amigos Library Services

Though Amigos offers many useful services, it is unclear how many of these services we qualify for. We will also need to contact Amigos to determine the actual rate for our dues and decide if this is cost effective for the services included.

#### Center for Research Libraries

CRL provides a unique service related to unique collections, however they are not well-aligned to our current needs. An exploration of CRL would try to identify whether their services would be beneficial in the future or if they should be fully removed from consideration.

#### Council on Library and Information Resources

The benefits of CLIR are comparable to Digital Library Federation, but would likely only impact one or two units and therefore do not have enough universal appeal commensurate to their cost. Analysis would decide whether CLIR should be considered in the future or fully removed from consideration.

#### Orbis Cascade Alliance

Due to the unknown, but presumably high cost associated with Orbis Cascade, as well as a loss of local control and disproportionate impacts to multiple technical service areas, a thorough cost/benefit analysis should be conducted that determines whether the multiple services offered by Orbis Cascade are commensurate with the potential cost. If Albertsons Library were to implement the Alma/Primo ILS as part of a necessary ILS migration independent of Orbis Cascade, it is possible that their evaluation score could rise dramatically and they would be reconsidered at that time.



Phase 2, Task 2: A group explores and assesses alternatives to paid access as outlined in the original Collections Task Force charge.

Though these alternatives will likely include a heavy emphasis on Open Access resources, the original Task Force charge document outlines additional topics, such as:

- Identify campus stakeholders and partners
- Create campus information campaigns and advocacy for Open Access preferences in Promotion and Tenure policies
- Enact budget reallocation to support open infrastructure
- Work with the Office of Sponsored Programs to establish greater grant support for library resources from non-library faculty
- Explore the impact of changes in editorships and peer-review support including “Pure Publish” agreements
- Explore greater options for academic library cooperation in Idaho

These options represent only a few of the potential avenues for discovery, but would help initiate and guide work into an emerging topic in librarianship.

Phase 3: The results of Phase 2 are effectively implemented or a new charge is developed if it is determined there are no actionable results from Phase 2.

It is difficult to predict what sort of information or strategies may be established during Phase 2, but it is likely there will be at least some projects to implement. During Phase 3, it may be prudent to expand the group to include additional staff who are better situated to help successfully implement any recommended changes.

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## **Appendix A: Strategies to Address Collections Budget Concerns**

- Collections Council continues to manages needed FY20 cuts
- LLT, with guidance from the Collections Council, develops a Library materials budget management philosophy that allows for a holistic, long term approach to purchasing and licensing collections content
- Establish an Investigations Task Force who will focus on two key areas
  - Review of consortium options
  - Explore alternatives to paid access
- Develop a budget request strategy for the FY21 budget cycle
- As needed, conduct an information campaign to educate and generate support for the library's efforts

### **Task Force Members**

- Heather Grevatt (Chair)
- Beth Brin
- Nancy Donahoo
- Amy Vecchione
- New Electronic Resources Specialist
- New Head of Scholarly Communications and Data Management

### **Task Force Charge**

- Conduct a review of consortium options including:
  - Identify potential consortial groups and evaluate whether Albertsons Library is potentially eligible to join
  - Specifically investigate Orbis-Cascade and the requirements involved in
  - Determine if other consortium should be seriously investigated.
  - Provide a report giving information on possible consortium options, including strengths and weaknesses, costs, contractual details, and information on when and why an option is not viable.
- Investigate the viability of alternatives to paid access

### **Task Force Parameters**

- Timeline
  - Initial consortium review is expected to take 2-3 months
  - Initial investigation of alternatives is expected to take 6-9 months with the potential long term initiative if ideas are implemented

- If a viable consortium option is identified and a decision is made to pursue it, some of the task force may be repurposed to implement that idea.
- The task force would focus on identifying the elements of any given specific alternatives strategies. While other members of the library staff would be charged with carrying out the specific strategies such as educational and informational campaigns.

### Alternatives Brainstorm

- Shifts to OA – either by discipline, journal, other...
- Faculty Education and Support Development
  - Alternatives Libguide
    - <https://ucsd.libguides.com/elsevier>
  - Roadshow
  - Explore ways to get feedback (tools we need to communicate/disseminate information, solicit feedback, capture suggestions/information/alternatives)
  - Explore ways to get public support from faculty
- Changes to editorships and peer review support for paid options
- Adoption of Open Access options in university P&T guidelines
- Budget reallocation to support open infrastructure
  - % of endowments
- Working with OSP to get money written into grants
- University-wide Information Campaign for alternatives
- Identify campus partners and stakeholders
- UnPay Wall (<https://unpaywall.org/>)

### Public Facing Library Information Pages

- AY2019-20 Journal Cancellations (Western Washington) <https://library.wvu.edu/node/19720>
- <https://guides.usfca.edu/c.php?g=885539&p=6363326>
- What Happens When a Journal Title is Cancelled? (Wright State) – <https://www.libraries.wright.edu/community/blog/2018/10/15/what-happens-when-a-journal-title-is-cancelled/>
- KU Libraries Content Budget Update: <https://lib.ku.edu/collection-management>
- Journal & Database (Serial) Cancellation Review Process 2019-2020 (UCSC) – [https://guides.library.ucsc.edu/serial\\_cancellations/serial\\_cancellations](https://guides.library.ucsc.edu/serial_cancellations/serial_cancellations)
- <https://www.lib.uiowa.edu/cancellations/>
- [https://www.lib.uiowa.edu/cancellations/files/2018/10/Cancellations\\_FacultyLetter\\_FI\\_NAL.pdf](https://www.lib.uiowa.edu/cancellations/files/2018/10/Cancellations_FacultyLetter_FI_NAL.pdf)

- <https://libnotes.missouristate.edu/2019/03/msu-libraries-addressing-budgetary-and-fiscal-challenges/>
- <https://libnotes.missouristate.edu/2018/10/rising-costs-challenge-the-libraries-operating-budget/>
- Budget Reductions at the Library (UAA) – <https://libguides.consortiumlibrary.org/cuts>

## **Appendix B: Interview Questions for Ben Hunter**

**Interview with Ben Hunter, Dean of University of Idaho Libraries; rescheduled for Tuesday, Jan 7, 2020, 2-3pm MST**

### **Introduction**

Thank you for meeting with us. I think you know some of us, but maybe not all of us, so before we begin, I would like us each to give a quick introduction, if you can share your name, department, etc.

We make up what is being called the Collections Task Force. We have been charged with exploring consortia options for Albertsons Library to help address budget concerns.

As part of our exploration, we are talking with people at different institutions about their consortial memberships and their perspective on the value of those memberships or collaborations.

For a little background, we started by looking at the International Coalition of Library Consortia (ICOLC) Participating Consortia list and have narrowed it down to nine organizations that we would like to consider more seriously, including Orbis Cascade. These range from Amigos to Orbis, to Western Regional Storage Trust, so we are using the term consortia very broadly to mean collaborative services or resources.

### **Questions**

Q1. We want to talk a lot about Orbis Cascade, but before we dive into that, does University of Idaho participate in any other consortia or collaborative buying? Why were these consortia chosen? Which areas of collaboration have been of particular interest to you?

Q2. Orbis Cascade:

2.a. How did UofI decide to join Orbis? Was UofI already an affiliate? Was a needs assessment conducted? Were other consortia considered?

2.b. How has joining Orbis (in a technical sense) worked? When you joined was a joint ILS required? (What was the timeline like?) Has linking systems, setting up the courier, etc. gone smoothly? What sort of challenges have been encountered? How does the courier work now in Moscow and in Boise?

2.c. How did you manage faculty and staff buy-in? Was there a formal change management plan? Did anyone have their job description altered to incorporate the membership commitments for Orbis?



2.d. Was additional funding required for membership costs? If yes, how did University admin respond? Are there concerns that the current budget deficit will affect Uofl's ability to remain in Orbis?

2.e. What is the expected ROI from membership? Have you started to see any benefits? Have there been any unexpected drawbacks?

2.f. How was the change received by the campus? Did patrons notice the increase in access?

2.g. If you had to do the process over, what would you have done differently?

Q3. Are you considering joining any additional consortia?

Q4. Are there any ways you think Boise State and Idaho State (or all three major universities) could work together better, particularly when it comes to shared collections or collective purchasing?

Q5. Do you have any additional comments or questions?

## **Appendix C: Interview Questions for Sandra Shropshire**

Interview with Sandi Shropshire, Associate Dean/ Associate University Librarian for Collections,  
Idaho State University Library  
December 10, 2019, 10-11am, Zoom

### **Introduction**

Thank you for meeting with us. I think you know some of us, but maybe not all of us, so before we begin, I would like us each to give a quick introduction, if you can share your name, department, etc.

We make up what is being called the Collections Task Force. We have been charged with exploring consortia options for Albertsons Library to help address budget concerns.

As part of our exploration, we are talking with people at different institutions about their consortial memberships and their perspective on the value of those memberships or collaborations.

### **Questions**

Q1. I think what we would like to start with, is Idaho State currently a member of any consortia? Why these consortia? Which areas of collaboration have been of particular interest to you?

Q2. I know there was some confusion about Idaho State joining Orbis Cascade, is joining Orbis Cascade Alliance as a full member something that Idaho State has considered?

2.a If no, is there a particular reason why ISU hasn't or wouldn't consider them?

2.b If yes, is there a reason why ISU has decided not to go with Orbis Cascade?

2c. Can you describe the consortial purchases you make with Orbis?

Q3. Are you considering joining any additional consortium or are there any you have considered and chose not to join?

Q4. Are there any ways you think Boise State and Idaho State (or all three major universities) could work together better, particularly when it comes to shared collections or collective purchasing?

Q5. Do you have any additional comments?

## **Appendix D: Library Leadership Team Interview Questions**

Library Leadership Team Interview  
Jan 23, 2020

### **Introduction**

Thanks for meeting with the Collections Task Force. The basic charge is to investigate consortial options to help address budget concerns.

[Share paper handout of the Strategies to Address Collections Budget Concerns task force and charge document]

The purpose of meeting with you today is to gather information by soliciting feedback regarding your perspectives on the library's needs and priorities relating to consortia.

Our process is to meet with the Library Leadership Team as a group, then follow up with a survey in hopes that you can elaborate further.

I will be asking questions and Beth will be taking notes. What you share with us will be shared with the collections task force.

We are gathering information from unit heads to give everyone a chance to offer feedback regarding the library's needs.

We will start with some shared definitions. We are using the term consortia very broadly to mean collaborative services or resources that will benefit one or all units of the library. Consortia offer many services for libraries. Typically they are a group of libraries that partner to coordinate specific services. We have made available a list of consortia services and shared definitions.

Do you have any questions before we get started?

### **Questions**

Q1: In light of current discussions about potentially participating in additional library consortia, which consortial services do you feel would benefit your specific unit most? Please explain why.

Q2: Does the unit you supervise have any needs that a consortia could address? If so, what are those needs?

Q3: Are there any services consortia can provide that we haven't mentioned that you feel would be particularly beneficial?

Q4: Please share your thoughts concerning ways joining library consortia might impact your unit.

Q5: Have you assessed your unit's services to evaluate any opportunities for growth? For example, do you have a list of services that you cannot offer, but could consider if we joined consortia? If so, what are those?

Q6: Which services in your unit would benefit from joining consortia? Please be specific.

Q7: When considering consortia to join, which overall library needs are the most important, in your opinion?

Q8: Is there anything else you would like to tell us? Thank you.

Thank you for your participation today. We would ask that you speak with your units about the work of this task force is undertaking. You may want to use these questions to begin a dialogue. As a reminder, we will send out a follow-up survey on January 29, 2020. We are asking that this survey be completed by February 7, 2020.

## Appendix E: Unit Head Supplemental Survey Questions

### Collections Task Force Supplemental Survey

Thank you for your participation in the Library Leadership Team interview with the Collections Task Force. Based on your responses, we have drafted these additional questions. We encourage you to speak with your units about the Task Force's charge, the work done so far, and the unit's general understanding of consortia before completing this survey. Helpful talking points you may want to utilize with your unit include:

- The Task Force is using the term consortia very broadly to mean collaborative services or resources that will benefit one or more, or all units of the library.
- We are not limited to recommending a single consortial solution. The Task Force may recommend that we participate in multiple programs with varying levels of commitment and participation.
- Consortial options include "all-in" programs in which we would be *required* to participate in all designated services as well as "opt-in" programs in which we have the *opportunity* to participate in one or more designated services.

This information will only be shared with the Collection's Task Force and may be summarized for use in a final report to the Collections Council.

Q1. What services or resources that a consortia could provide do you believe would be particularly beneficial for your unit?

Q2. Does your unit have any needs that a consortia could address that you did not get a chance to speak to in the Library Leadership Team meeting? If so, what are these needs?

*(For example: My unit does not have a good opportunity to engage in service at the national level and a consortia with committee requirements might help with this.)*

Q3. Generally speaking, how familiar are the faculty/staff in your unit with the services and resources consortia can provide? Are they familiar with the consortial activities the library already participates in?

Q4. If Albertsons Library moved toward an "all-in" consortium membership, what training or support do you think would be necessary for faculty/staff in your unit to prepare for the move?

Q5. What current services or resources would you like to see minimally impacted by any new consortia partnerships? Are there any services or resources that you believe could be reduced or eliminated?

Q6. Are there any steps that you believe should be taken before the library considers any new consortia? If so, please describe the specific steps and why they would be important or necessary.

## Appendix F: Consortial Services and Shared Definitions

### Consortial Services and Shared Definitions

A wide variety of consortia exist, offering diverse services as well as opportunities for involvement/interaction with other libraries, research facilities, museums, and governmental entities. The value of the services offered depend on the identified needs and priorities of the Library researching consortial opportunities.

One clear distinction should be made in the structure of consortial membership and participation.

- \* **OPT-IN** offers the member library an 'opportunity' to participate in the wide variety of services offered.
- \* However, an **ALL-IN** structure 'requires' all members to participate in the designated services.

There are a number of issues, such as Intellectual Property, Bibliographic Record ownership, and conflict with local library/University policies, which should be carefully reviewed as offerings of consortia are considered.

### Services with Explanations

#### Print Journal Repository Program

Participating libraries consolidate and validate print journal backfiles at major library storage facilities and at selected campus locations. Shared print journal archives ensure access to scholarly print content, reduces need for paid Interlibrary Loan requests to GET IT NOW or Copyright Clearing House, and allow member institutions to optimize campus library space. Allows for network-level shared print archive.

#### Shared Print Monographic Program

Focuses on local and peer-to-peer collection analysis to establish shared monograph print retention. Allows member libraries to reclaim space and enhance resource sharing. Given proximity of collections, speed of receipt of ILL print monograph requests enhanced, and costs reduced with reciprocal borrowing.

#### Reciprocal Faculty Borrowing Programs

RFBP provides your faculty or other authorized researchers to directly access library collections at participating research libraries or consortia who have agreed to participate in a reciprocal agreement.

### Reciprocal Interlibrary Loan

Individual libraries as well as consortia often establish reciprocal borrowing arrangements between and among each other to supply interlibrary loans and article copies for free.

### Resource Sharing Network

Enables patrons from member libraries to directly borrow items from other participating libraries using OCLC's WorldCat Navigator software without all having to be on the same ILS system. Could be considered a 'first step' for cooperation without adding extreme expenses.

### Union Catalog

A union catalog is a combined library catalog describing the collections of a number of libraries. Union catalogs have been created in a range of media over the years -- more recently, networked electronic databases. These electronic versions typically support keyword and Boolean queries. Separate library ILS systems communicate with specific software that allows easy identification of each library's holdings.

### Physical Courier Delivery

Consortia often maintain a physical delivery network for exchanging library materials across the libraries included as members or affiliates. Geography plays a crucial role in the delivery development. Driving distances, mountain passes, weather considerations, level of demand for more than weekly services, and even local political situations may impact the viability of the physical courier service. Cost and speed of delivery, however, have the most impact on delivery decisions. Generally, a review is completed of the four (4) primary delivery options, including costs, speed, variances such as 'drop sites', etc. to determine 'best options'.

### Shared Digital Library

May involve purchase on behalf of members for licensed repository software to allow consultation, technical support, and provision of local materials documenting the history, culture, and geographical diversity special collection holdings. Also can provide descriptions of archival and manuscript materials held by member institutions as well as digital images.

### Shared Integrated Library System

Shared catalogs made possible through joint ILS systems provide a way for library users to discover and access resources beyond the local institution. They also provide opportunities for member libraries to gain efficiencies in staff time and to have cleaner data and bibliographic records through sharing of catalog records. Despite the benefits of shared cataloging, it can present challenges vis-a-vis setting priorities around database maintenance and around retrieving collection metrics. Initial and ongoing costs need to be closely examined, and should funds become tight, what options are available for 'record ownership, removal of records, and return of value of investment'.

## Staff Development & Workshops

Consortia utilize various levels of expertise between and among member libraries to offer live webinars, free information sessions, and demonstrations of software and best practices. Generally there are also opportunities for conferences and face-to-face meeting to facilitate learning, cooperation, and long range planning.

## Grants/Scholarships

Many consortia set aside funds for library staff at member libraries to attend conferences or other continuing education opportunities. In other instances, consortia provide funding to support conducting, publishing and presenting research. These funds are generally designed to supplement any funding that is available from member libraries. There may also be support for the enrollment of member libraries' paraprofessional staff in accredited library and information science programs through offering scholarships that help provide financial aid for staff of member libraries.

## Shared Collection Development

Shared Collection Development can represent a number of levels in consortial cooperation. It can refer to 'last copy retention' guidelines agreed to for maintenance of at least some ready access of a monographic title in the region. It can mean that member libraries have agreed to purchase certain content from the same vendor, offered discounts as an incentive, and the vendor identifies when more than a specific number of copies have been ordered as per 'guiding principles'. This allows ongoing review of a need to spend local funds when multiple copies are available for resource sharing in the member libraries. Still yet, some consortia offer e-books, streaming video, etc. purchased collectively with ownership of post cancellation perpetual content provided to all member libraries who 'contributed' to the cost. In the past, it appears that much of the emphasis concerning collections and collaboration has centered on sharing of resources only. Demas and Miller (2012) argue that this is because sharing in the development of collections is much more complex than simply lending and borrowing; they assert that the challenges are more about management, not collection development, and that shared ownership requires a large amount of trust among the collaborators.

## Cooperative Purchases of Electronic Content

There is no doubt that 'numbers count' when negotiating consortial licenses for electronic resource cooperative purchases. The consortia take on the role of negotiating licensing to provide offers for single or multi-year contracts for electronic content at 'deep discounted' rates. Services provided by the consortia include:

- + Obtaining or requesting price quotes for eResources
- + Receiving notification of pending renewals
- + Accessing current and past invoices



- + Confirming all new acquisitions, renewals, and cancellations
- + Managing institutional data like user contacts, access IP ranges, FTE, etc.

Cooperative purchasing opportunities should not be confused with 'Shared Collection Development'. Cooperative purchasing simply allows a library to determine whether they wish to purchase e-resources at a discounted rate. The content is for that library's constituents to use, and is paid for solely by the member library. There is a wide range in number of offerings among the various consortia in the United States.

### Appendix G: Consortia Evaluation Criteria Rubric

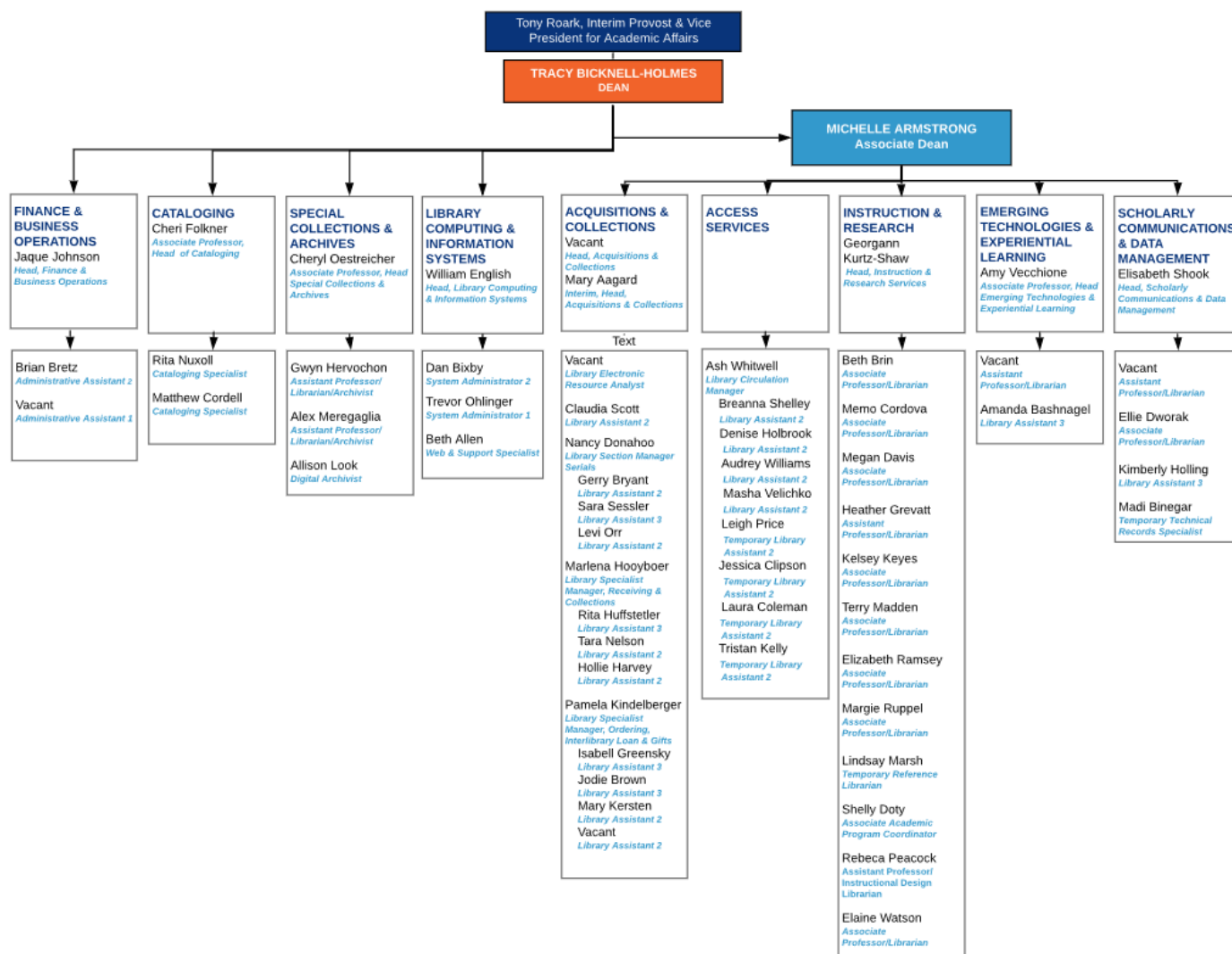
Criteria						
	Fair	Good	Excellent	Unsure	Score	Comments/ Explanation
<b>Services Provided</b>						
Physical Courier Delivery						
Reciprocal Faculty Borrowing						
Shared Integrated Library System						
Shared Print Monographic Program						
Union Catalog						
Closed Captioning and Accessibility Support						
Grants and Scholarships						
Mass Digitization						
Reciprocal Interlibrary Loan						
Shared Cataloging						
Shared Collection Development						
Shared Digital Library						
Best Practices Assistance						
Cooperative Purchases of Electronic Content						
Print Journal Repository						
Provides a Needed Service Not Listed Here						
Resource Sharing Network						
Staff Development and Workshops						
<b>Cost</b>						
Cost is unknown and requires negotiation						
Potential cost savings are incalculable						
Cost is unknown, but is a set rate based on library budget						
Cost is known and exceeds \$5,000 annually						
Potential cost savings could be calculated with limitations						
Cost is known and is \$4,999 or less annually						
Potential cost savings could be clearly calculated						

<b>Time - Implementation</b>						
Multi-year implementation						
6-month to 1-year implementation (estimated)						
Less than 6-month implementation (estimated)						
<b>Time - Ongoing Participation</b>						
Mandatory new time commitments (e.g. committee work)						
More than 1-year contract						
Encouraged new time commitments (e.g. no staff benefit without active participation)						
Participation could be incorporated into current workflow with minimal disruption						
<b>Workload - Distribution and Impact to Current Workflows</b>						
Workload would disproportionately impact at least one unit with little opportunity for mitigation (e.g. work requires significant technical knowledge)						
Workload disproportionately impacts at least one unit, but impact could be mitigated (e.g. work is specialized, but could be learned within 3-6 months)						
Workload does not disproportionately impact a unit or can be mitigated easily (e.g. work is siloed, but could be learned within 1-3 months)						
<b>Preparation for Implementation</b>						
Multi-year preparation						
Preparation requires significant staff time (e.g. mass data migration)						
Preparation requires new products (e.g. new ILS)						
6-month to 1-year preparation						
Preparation requires moderate staff time (e.g. compiling shelf list)						
Less than 6-month preparation						
Preparation can be incorporated into current workflows						

<b>Training</b>						
Significant training required prior to implementation (e.g. learn new ILS)						
No free or low-cost options are available necessary for training						
Some training required prior to implementation (e.g. learn new procedures)						
Low-cost options are available for necessary training						
No training required prior to implementation						
Free options are available for necessary training						
<b>Local Control</b>						
Consortium has mandatory unique cataloging standards						
Consortium has last copy agreements						
Consortium has copy threshold agreements						
Consortium has encouraged unique cataloging standards						
Consortium has mandatory shared purchasing decisions						
Consortium has no unique cataloging standards						
Consortium has voluntary shared purchasing						
<b>Patron Benefit</b>						
No direct patron benefit						
Patron benefit requires active engagement (e.g. use of Interlibrary Loan)						
Patron benefit requires patron education (e.g. learning new system)						
Patron benefit is discipline specific (e.g. new subject database)						
Patron benefit is easy to communicate (e.g. new database access)						
Patron benefit has wide appeal (e.g. multi-disciplinary database)						

<b>Staff Benefit</b>						
Staff benefit is mostly not aligned with library strategic plan and goals						
Staff benefit will impact 1-2 library units						
Staff benefit is well-aligned with unit goals or strategic plans						
Consortium offers unit specific professional development						
Staff benefit is well-aligned with library strategic plan and goals						
Consortium offers professional development with wide appeal to many units						
<b>Additional Comments/Questions</b>						

## Appendix H: Albertsons Library Organization Chart (as of January 13, 2020)



January 13, 2020

## Appendix I: Collections Task Force Memo to Collections Council April 10, 2020

### Memorandum

**Date:** Friday, April 10, 2020

**To:** Albertsons Library Collections Council and Tracy Bicknell-Holmes, Dean, Albertsons Library

**From:** Collections Task Force - Heather Grevatt, Beth Brin, Nancy Donahoo, Elisabeth Shook, Amy Vecchione

**Subject:** RECOMMENDATION TO IMPLEMENT STATEWIDE CALIFORNIA ELECTRONIC LIBRARY CONSORTIUM AHEAD OF FINAL REPORT

In the interest of good fiscal stewardship, the Collections Task Force would like to recommend that the Collections Council and Albertsons Library administration allow Serials Manager, Nancy Donahoo to proceed with affiliate membership in the Statewide California Electronic Library Consortium (SCELC) prior to the submission of our final Task Force report. As some of the renewals under discussion begin July 1, 2020, we ask that you communicate your decision to us by April 30, 2020 in order to allow Nancy sufficient time to work with the vendors.

The COVID-19 pandemic and the rapid shift to remote work has delayed our final report, however within the report we are recommending joining SCELC as affiliates in order to utilize cost savings associated with shared electronic resource purchasing. Nancy has already confirmed with SCELC Library Relations Manager Eric Chao potential savings in relation to our subscription to BioOne Complete. As renewals for impacted subscriptions are approaching we believe it is prudent to act quickly on this particular issue. Some areas we would like to highlight:

- Per the SCELC website:  
Statewide California Electronic Library Consortium (SCELC) was established in 1986 to develop resource-sharing among the libraries of private academic institutions in Southern California. Since its inception, SCELC has evolved to include all of California and is a 501(c)(3) tax-exempt corporation. SCELC represents:
  - 113 member institutions
  - 221 affiliate institutions
  - Approximately 500,000 aggregate student population
  - Over \$200,000,000 in library budgets
  - More than 21,430,000 volumes

SCELC libraries can choose from nearly 2,500 electronic resources through over 100 vendors. SCELC is one of the top five consortia in licensing volume in North America.

- Though SCELC began as a California consortium, their affiliate membership represents multiple states from Arizona to Maine and even Canada. Under current bylaws, full members must be private institutions, however affiliates include a wide variety of institutions including public, R1 schools, such as University of Texas at El Paso.

- For Albertsons Library SCELC would be an “opt-in” consortium and the cost of membership is incorporated into the price of subscriptions (similar to elements of our current relationship with Orbis Cascade Alliance).
- As an opt-in, we can ask to subscribe to only titles we want. All titles currently under consideration are products we already subscribe to, but are attempting to access at a lower rate.
- Per Nancy, the agreement with SCELC is comparable to current agreements and should not be subject to any licensing issues, though the [SCELC Library Agreement](#) would need to be signed by Tracy.
- Advanced adoption of SCELC would not alter our recommendations in the final report, we would simply adjust language to reflect that this step has already been taken.

If after reviewing this memo you have any questions or concerns the Collections Task Force would be happy to meet with you digitally at your convenience or follow up via email.

Sincerely,  
Heather Grevatt  
Collections Task Force Chair