Annual Report April 2015

Last Council Meeting (April, 2014) Marmot invited Innovative to demo new products. Having migrated to Sierra in December 2013, we were interested in new features and products based on an *open* library services platform; we were already keen to replace Sierra fat-client software with web-based user interfaces; we were intrigued by Mobile Circulation; and we were concerned about how the acquisitions of Polaris and VTLS might affect the Innovative roadmap. We also invited CLiC and the Colorado Alliance to share their plans for 2014. Jim Duncan talked about recent price reform and continuing efforts to make the Courier as good as possible. George Machovec reported Prospector statistics and news, including a plan to link up with MOBIUS. By April 2014 Marmot libraries had settled into a volume of resource sharing via Marmot and Prospector such that 2013 could be considered a baseline for CLiC Courier costs and library staff effort. Resource sharing costs continue to be an important issue for Marmot directors.

This Council Meeting (April, 2015), Marmot libraries are basically satisfied with Sierra functionality and customer support, but Innovative moves slowly for thousands of customers worldwide. Since last April we've seen little progress on product directions Marmot cares about. Meanwhile Marmot does benefit from Sierra architecture that allows developers of Pika (aka "Marmot VuFind") to respond promptly to evolving member needs without having to wait for a future release of Sierra. In 2014 Marmot implemented new APIs by Innovative and took advantage of the open database to make Pika more efficient and functional. The "availability" facet in Pika is accurate within minutes now because Sierra accommodates discovery layers like Pika. Marmot is actively working with API developers at Innovative, and we still look forward to eliminating "screen scraping" to make Pika more sustainable.

Pika features like "record grouping", "responsive design", and numerous usability improvements were much appreciated by members in 2014. Other libraries wanted Pika without necessarily joining Marmot. After reviewing a business plan with the Executive Board, Marmot created a new line of service for "Discovery Partners". At Council 2015 we are reporting on Pika development for full members plus new associate members.

Another important service line is information technology infrastructure. Nine members opt for maintenance and support of broadband, Wi-Fi, local area networks (LANs), and workstations for staff and patrons. Marmot annually applies for federal E-Rate funds covering as much as 60% of broadband costs. In 2014, when a 3-year contract with Mammoth Networks was ending, Marmot issued an RFP for broadband service. Cedar Networks won the bid, and at this point Cedar has replaced DSL with optical fiber in 4 Garfield County branches. In 2015, Cedar will finish installing fiber for all 6 GCPLD branches, plus MCPLD Central, Pitkin County Library, and the Avon branch of Eagle Valley Library District.
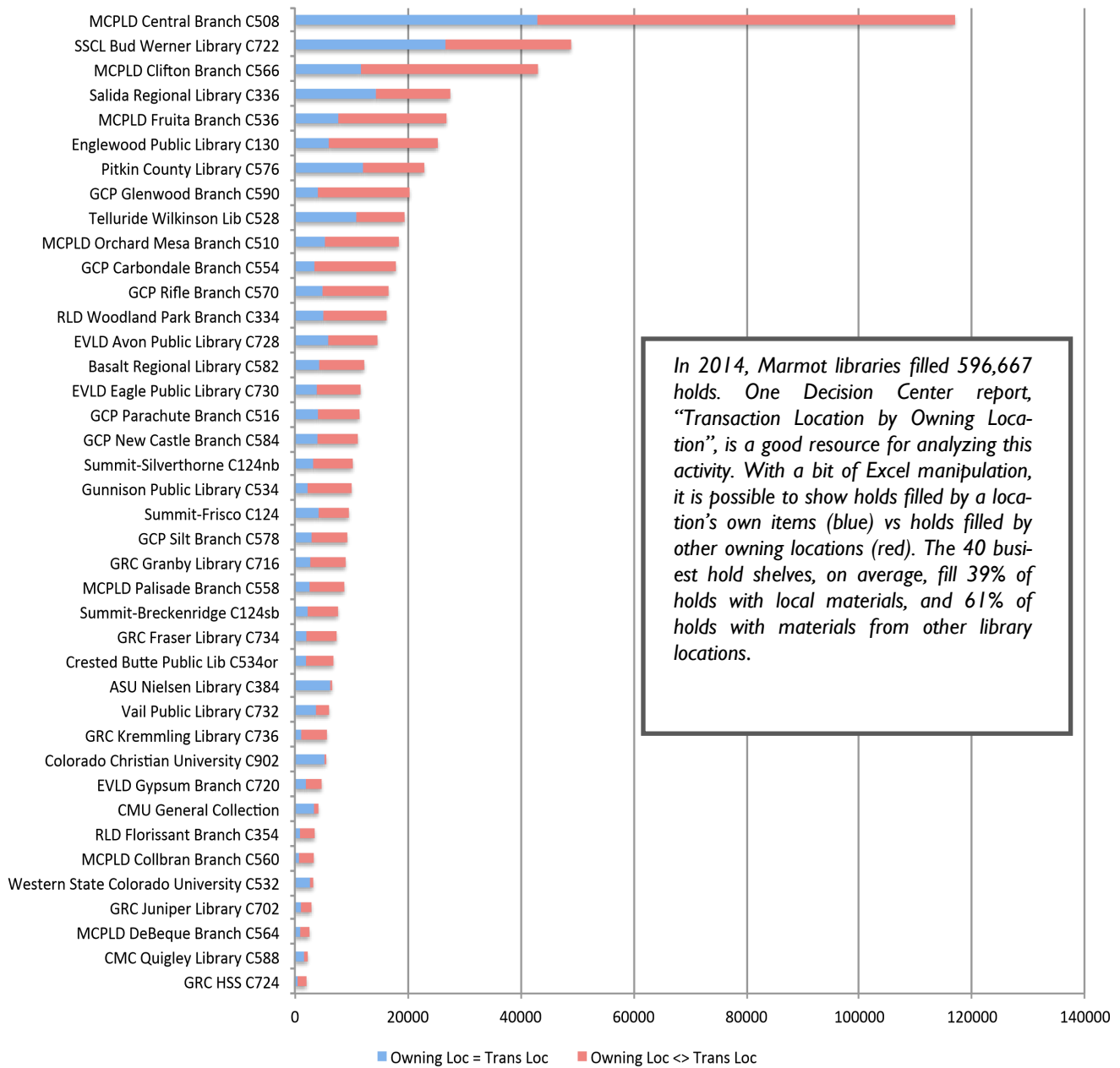
This annual report is followed in the Council Meeting 2015 binder by a paper on "Marmot Growth and Organization". It begins,

> With recent and imminent growth it's good to clarify specific business lines, and to organize staff so that each business line can successfully serve member libraries. From 2009 to 2015Q1 Marmot grew from 19 to 27 members, and in 2014 Marmot launched associate membership for [5] "Discovery Partners".

The rest of this *Marmot Annual Report 2015* consists of reports by User Services Manager Brandon Cole, R&D Manager Mark Noble, IT Services Manager Sean Hanson, and Business Manager Mary Vernon.

Holds Filled 2014 (40 busiest locations)

Location	
MCPLD Central Branch C508	
SSCL Bud Werner Library C722	
MCPLD Clifton Branch C566	
Salida Regional Library C336	
MCPLD Fruita Branch C536	
Englewood Public Library C130	
Pitkin County Library C576	
GCP Glenwood Branch C590	
Telluride Wilkinson Lib C528	
MCPLD Orchard Mesa Branch C510	
GCP Carbondale Branch C554	
GCP Rifle Branch C570	
RLD Woodland Park Branch C334	
EVLD Avon Public Library C728	
Basalt Regional Library C582	
EVLD Eagle Public Library C730	
GCP Parachute Branch C516	
GCP New Castle Branch C584	
Summit-Silverthorne C124nb	
Gunnison Public Library C534	
Summit-Frisco C124	
GCP Silt Branch C578	
GRC Granby Library C716	
MCPLD Palisade Branch C558	
Summit-Breckenridge C124sb	
GRC Fraser Library C734	
Crested Butte Public Lib C534or	
ASU Nielsen Library C384	
Vail Public Library C732	
GRC Kremmling Library C736	
Colorado Christian University C902	
EVLD Gypsum Branch C720	
CMU General Collection	
RLD Florissant Branch C354	
MCPLD Collbran Branch C560	
Western State Colorado University C532	
GRC Juniper Library C702	
MCPLD DeBeque Branch C564	
CMC Quigley Library C588	
GRC HSS C724	

X-axis: 0, 20000, 40000, 60000, 80000, 100000, 120000, 140000

Legend: ■ Owning Loc = Trans Loc   ■ Owning Loc <> Trans Loc

> In 2014, Marmot libraries filled 596,667 holds. One Decision Center report, "Transaction Location by Owning Location", is a good resource for analyzing this activity. With a bit of Excel manipulation, it is possible to show holds filled by a location's own items (blue) vs holds filled by other owning locations (red). The 40 busiest hold shelves, on average, fill 39% of holds with local materials, and 61% of holds with materials from other library locations.

User Services

Physical Resource Sharing
The User Services department had a couple large projects in 2014 with regards to resource sharing. The Alliance announced a resource sharing partnership with MOBIUS. This would allow existing members of Prospector to borrow and lend items with libraries in Missouri. This plan also required new INN-REACH i-types and p-types be added to Sierra. Initial inspections of the tables indicated that the portions of the tables where these new codes would reside needed to be cleaned up. Marmot began a project to consolidate p-types. This project called for deduping p-types and organizing the p-type table into sections based on Academic, Public, and Schools. With input from Marmot members, plans were put together showing what the new table would look like, and how members would fit into the new p-types. Marmot hired Innovative to complete the consolidation using these plans. This project was completed on January 7, 2015. During the p-type consolidation it was found that libraries with branches were set up in the system so that every branch had its own agency code for patrons and items. This was the reason that Agency holds hadn't worked correctly. Marmot converted each library district to share one common agency code on all patrons and items so that Agency holds would
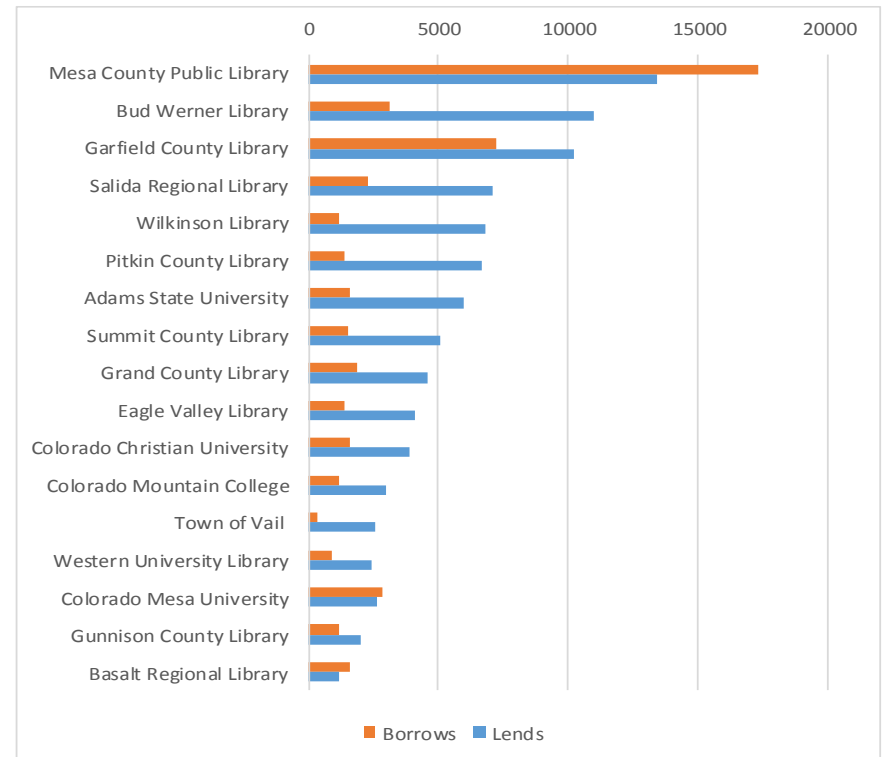
work as originally specified. Due to the request of some libraries to opt out of MOBIUS, Marmot Director Jimmy Thomas met with executive staff. Innovative came up with an option to allow some Marmot libraries to opt out of connecting with MOBIUS while still having access to Prospector. On February 18, 2015 five Academic libraries joined the link with MOBIUS. Other projects this year were Patron self-registration, Circa Wireless Inventory, SMS notices, and a Spanish notice option.

Marmot Union Catalog

One of the big events that happened for the Marmot Union Catalog was a standardizing of Cataloging services. Members were given a choice between OCLC and SkyRiver for their records. The consortium split pretty evenly on this with 15 members opting for OCLC and 12 opting for SkyRiver. In 2014 the effort to maintain a clean catalog continued with a total of 89,242 records being either modified or deleted between 7/8/2013 and 10/22/2014. Lastly the UCC looked at the need run a full authority control on the records. The last major authority control project was in 2006; quarterly updates have been done since then, but this reflects only authorities in the base records, not any new records added since that time. Marmot is working with LTI to schedule a complete authority control process in the summer of 2015.

Marmot Digital Library

As more and more sources for e-

content arise Marmot has been working to keep up with sources that work best within the organization. OverDrive continues to be a central source for ebooks and other related econtent. One of the big improvements to the OverDrive interface this year was the incorporation of eReading Rooms. This makes it so that juveniles, teens, and adults have their own splash pages for overdrive. These pages display relevant content for each of these groups.

A growing focus for Marmot members in 2014 was eMagazines. Some members were already using Zinio as a source for their eMagazines. The fea-

tures, interface, and available collection made Zinio the standout choice for a shared emagazine collection. Marmot also added new collections to the existing collections on the Adobe Content Server. These collections included 25 ebooks from eBooksAreForever and 44 ebooks from McGraw-Hill.

Research and Development

Pika Development

We introduced VuFind+ 2014 last year during the Council Meeting in Carbondale. At that time, we had one member live on VuFind+ 2014 with several others poised to adopt it immediately after Council. Today all members except CMU have migrated to the new version of VuFind which we renamed Pika at the end of 2014 to avoid confusion with the VuFind trunk software

maintained by Villanova.
Throughout much of 2014, our focus was on improving Pika to improve usability and functionality for staff, students, and patrons. As always, we continue to welcome feedback and suggestions from library staff to improve overall functionality.
As we add new capabilities to Pika, Marmot continues to be recognized as innovators in the field. In Q2 2014 we

were featured by III as early adopters of their APIs in both a press release http://www.librarytechnology.org/ltg-displaytext.pl?RC=19132 and video https://www.youtube.com/watch?v=0Oay-9hievc&feature=youtu.be.
And, in Q3 2014 Marmot and Garfield County Libraries co-presented at

Internet Librarian discussing Pika and the integration between Pika and Garfield's library website. The presentation was well received and a number of libraries sought us out to learn more about the innovations within Pika especially our development of Record Grouping.

eContent

We continue to monitor the eBook market to look for new technology to implement for members. We are preparing to implement APIs for OneClick Digital and eVoke 2.0 eBook platforms. We have signed on as a grant partner with New York Public Library's Library Simplified project to develop an open source eBook reader that would handle eBooks from all content sources.

Discovery Partners

Towards the end of 2014, Pika had matured enough to allow us to offer Pika as a new service to libraries outside of Marmot who are not good candidates for full Marmot membership due to size, complexity, or geographic location. Our initial cohort of Discovery Partners includes five libraries: Anythink Libraries (CO), the AspenCat Union Catalog run by Colorado Library Consortium, Flatirons Library Consortium (CO), Wake County (NC), and Nashville Public Library (TN). Of these,

three discovery partners are already live with Pika: Anythink, Wake County, and Flatirons. The remaining partners will go live over the next couple of months.

The addition of our initial cohort of Discovery Partners allowed us to fund a new Developer position within Marmot. However, our Discovery Partners provide much more than money. They also bring increased clout with vendors as we request new APIs and enhancements to existing APIs; great ideas for improvements for Pika; and additional help with functional testing of Pika to ensure that it works for a broad spectrum of library needs.

Digital Repository

In the middle of 2014, a critical mass of Marmot directors identified the need to start a digital repository for use by all Marmot members. The Digital Repository Task Force was formed in September of 2014 to evaluate digital repository needs and evaluate potential solutions.

For the past 6 months the DRTF has been learning from other institutions that already have digital repositories or that set them up in the past. Some key findings include:

1. To be successful the repository must be treated as a fully funded program designed for long term success not a short term project.

2. There is grant money available from a number of sources that can be used for digitization projects. And,

additional money can be found locally to fund specific projects. However, the grants amounts are normally relatively small and would not provide enough continuity to fund the digital repository from year to year. Therefore, we will need to provide a base level of funding to the digital repository from within Marmot to ensure that it stays active.

3. Most modern digital repositories are moving to the use of linked data. Using linked data will allow us to enhance the display of resources within the repository and make them available to search engines like Google.

4. Although we plan to have the primary access point for the repository be a part of Pika, we also need to allow for custom interfaces for individual institutions or projects within the repository

5. To increase the appeal of the digital repository to researchers and patrons, we should focus on implementing specific projects where all the artifacts are shown within a specific context and form a cohesive unit rather than attempting a broad digitization effort without including context.

The first phase of work by the DRTF will conclude with a detailed report to Marmot directors outlining the first two years of operations with a roadmap covering the first five years of operations. The DRTF will also create an LSTA grant application covering Fiscal Year 2015-2016.
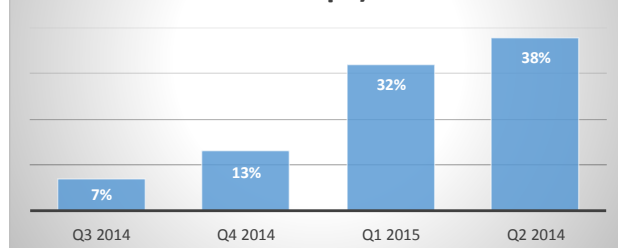
IT Services

Nine member libraries experienced steady growth in IT services, and ever more complexity in:

- Staff and Public workstation populations holding steady throughout the year

- Wi-Fi upgrades and mobile printing for patron-owned devices

- Added diversity of self-service and sorting appliances (SIP clients)

- Broadband upgrades from DSL and T-1 to fiber, Metro-Ethernet, and cable

- Increasing variety of security, climate-control, and other devices on LANs

- Continual equipment moves for library remodels and relocations

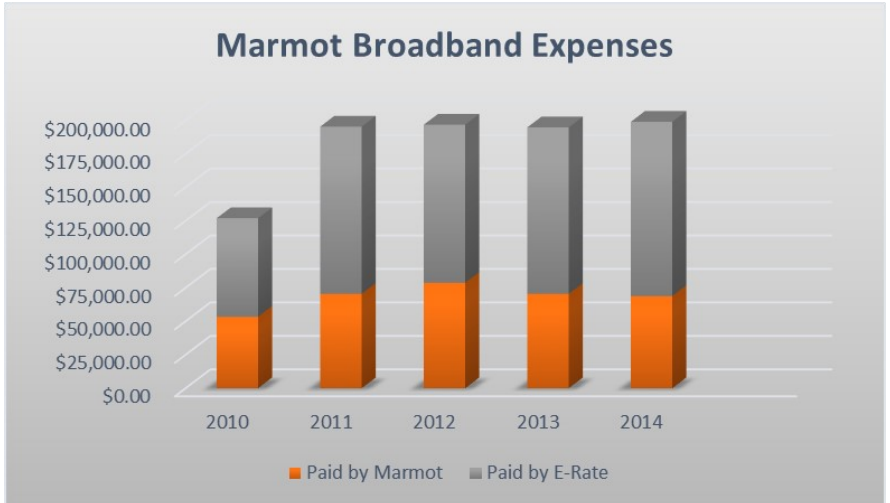**% of supported workstations on High-Speed Broadband (50 Mbps - 1Gbps)**

Quarter	%
Q3 2014	7%
Q4 2014	13%
Q1 2015	32%
Q2 2014	38%

- Network restructuring that includes IP privatization & DHCP

Business Office

Marmot was approved for $130,115.08 in subsidies for E-rate funding year 2014-2015. Subsidies (called "discounts") are a percentage of Marmot expenditures on telecommunications and Internet access. The level of discount for the consortium is calculated based on the percentage of students eligible for the USDA's National School Lunch Program (NSLP).

Mary Vernon submits applications semi-annually after vendor bills have been paid. For E-rate FY2014-2015, Marmot received $72,298.98 (July 2014 - Dec 2014 invoices). The remaining funding balance (January - June 2015 invoices) is expected sometime in August 2015.

Marmot Broadband Expenses

(bar chart showing expenses from 2010 to 2014, with values on the y-axis from $0.00 to $200,000.00; legend: Paid by Marmot, Paid by E-Rate)

New Talent at Marmot

Pascal Brammeier, Junior Developer As Junior Developer, Pascal Brammeier's responsibility is to assist in development, maintenance, and support of VuFind open source discovery layer software. In college while studying astronomy Pascal used his web-development skills to help search for undiscovered brown-dwarfs in orbit around nearby stars. Later Pascal worked for a solar panel installation company which uses the web to track their installation projects and organize their business.

Aaron Brumbaugh, Tech Support Analyst Analyst provides help desk support for library staff. His responsibilities include installation, maintenance, and support of computer equipment in libraries. Before joining Marmot, Aaron worked in a variety of library roles, from Security Office to Library Associate at Mesa County Public Library. He assisted in running the PC reference desk and helped establish new procedures.

Tammy Poquette, Library Systems Trainer Her responsibility is to develop courses and deliver application software training to library employees using Marmot systems. She comes to Marmot with 19 years of experience as Circulations Services Manager for Champlain College Library in Burlington, VT. A major accomplishment for Tammy was managing the migration to Millennium for their circulation department.

Marmot User's Group 2014

MUG 2014, held on September 11th & 12th, was well-attended with a total of ninety-seven guests representing twenty-one libraries. There was an overall positive response to the workshop facilities, food, and reception. Through the survey, one person shared, "We learned a lot during the sessions, but even more during the reception. It is ALWAYS great to put a face on a voice or a name! And I am amazed how easy it is to talk to EVERYONE there." This affirms the importance of both the formal and informal aspects of MUG and the opportunity to meet and network with other members.

The survey response specifically showed that "Whole Person Readers' Advisory," presented by Duncan Smith (Vice-President of EBSCO) and "Digital Resources Project Update" presented by Joseph Sanchez (Director of Mesa County Libraries) and Jordan Fields (Garfield County Libraries) were particularly pertinent. Regarding the sessions, one person responded, "I feel like the sessions at MUG were great this year! Inspiring keynote speakers, training, news about other things other libraries are dealing with."

Finally, we learned areas for improvement. According to survey results, two suggestions rang out loud and clear: 1) A preference for more general sessions instead of too many simultaneous sessions (difficult for one representative per institution to cover); 2) Members would like to see a better balance between sessions presented by Marmot and sessions presented by librarians. We appreciate your comments and suggestions and look forward to planning an even better MUG 2015.

Marmot Members

Public Libraries

Basalt Regional Library
Bud Werner Memorial Library
Buena Vista Public Library
Eagle Valley Library District
Englewood Public Library
Garfield County Libraries
Grand County Libraries
Gunnison Public Libraries
Mesa County Libraries
Pitkin County Library
Pine River Public Library
Rampart Library District
Salida Regional Library
Summit County Libraries
Town of Vail Public Library
Wilkinson Public Library

Academic Libraries

Adams State University
Colorado Christian University
Colorado Mountain College
Colorado Mesa University
Fort Lewis College
Western State Colorado University

School Libraries

Aspen Schools
Englewood Schools
Mesa County Valley Schools
Plateau Valley School
Steamboat Springs Schools

Discovery Partners

Anythink (Rangeview Library District)
AspenCat
Flatirons Library Consortium
Nashville Public Library
Wake County Public Libraries

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Buena Vista Public Library

Fort Lewis College

Pine River Public Library