

Where are library consortia going?

Results of a 2009 survey

Based on a paper presented at the 32nd UKSG Conference, Torquay, March/April 2009

Cooperative efforts among libraries are not new in the United States but date back at least 130 years. Historically, the creation of cooperative catalogs, inter-library loan (ILL), and cooperative acquisitions have been of paramount importance. Currently, library consortia are growing worldwide. A survey of members of the International Coalition of Library Consortia conducted in March 2009 revealed that the highest priorities are changing. While cooperative catalogs, ILL and acquisitions are still at the top of the list for many consortia, the highest ranked issues for the immediate future are renegotiating licenses and budget management, two topics that may not have been included in a list of issues had this survey been conducted prior to the economic crisis that began in the fall of 2008.



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A brief history of library consortia

Library consortia are not new. Library cooperation in America has existed for over a century. Many authors of articles about library consortia – Alexander¹, Bostick², Patrick³ and Weber⁴ among them – have covered this history very well. A key point, as Adrian Alexander has said, is that “The history of library cooperation is as long as the history of ‘professional’ librarianship in America...”⁵ He dated library cooperation to 1876 and to some of the earliest work of the American Library Association. Weber⁶ presented the history of the three areas of earliest cooperation. Outstanding developments in those areas were:

- **Catalogs:** In 1876, the newly created American Library Association formed the Committee on Cooperation in Indexing and Cataloguing College Libraries and in 1901, the first regional union catalog was developed at the California State Library.
- **Inter-library Loan (ILL):** In 1898, the University of California Librarian announced his willingness to lend to any other libraries willing to reciprocate with UC.
- **Acquisitions:** The first South American ‘expedition’ for cooperative purchasing took place in 1913–14. Interestingly, when they

returned from their expedition, the organizers had difficulties allocating costs among members, a situation that consortia members will find all too familiar even today.

Weber did an excellent job outlining the historical forces that encouraged library cooperation for the next 100 years, including the Depression and the post WWII era of increased emphasis on science and research. More relevant to this paper is the fairly recent development of state-wide consortia. In the late 1980s, OhioLINK was established. This was the first statewide consortium that followed a new mode and received widespread attention because they were able to obtain additional state money for their cooperative work. The OhioLINK members began work on a shared catalog in 1990 and in the same year captured international attention by loading the consortium’s first four databases. Several years later, in 1994, VIVA (The Virtual Library of Virginia) was started. Other states soon followed the trend, with Galileo being established in Georgia in 1995 and the California Digital Library being created in 1997. Other states, regions and special purpose groups have continued to form consortia as well. In fact, I recently learned that just a few months ago, in September (2008),

Kentucky organized a new academic consortium called FOKAL (Federation of Kentucky Academic Libraries).

A significant development occurred in 1996 when the Consortium of Consortia – now known as the International Coalition of Library Consortia, or ICOLC – was formed. Its first official meeting was held in February 1997 in St. Louis, Missouri. Since that time the ICOLC has held two meetings a year. At first, meetings were held only in North America, but as the group grew and became more international, it began to hold a spring meeting in North America and a fall meeting in Europe.

While the ICOLC is a very vibrant and active group, it is nevertheless a completely informal one. There is no formal structure of any kind – it has no bylaws, no membership dues, and no elected officials, although Tom Sanville of OhioLINK is the recognized, albeit unelected, leader.

Although the ICOLC is clearly enormously successful, one unfortunate by-product of its informality is that it is unclear what consortia actually 'belong'. Several times over the past decade, in order to get a handle on membership, I have resorted to counting the consortia listed on the organization's website as 'Participating Consortia of the ICOLC'⁷. In the spring of 2000, 135 consortia were listed, of which fully two-thirds (90 consortia) were in the United States and one third were in 21 other countries. In March 2009, when I repeated the exercise, I counted a total of 211 consortia – there were then 129 consortial participants listed in North America (US, Canada and Mexico), plus 47 in Europe, 13 in Asia, eight in Africa, eight in Australia/New Zealand, and three multinational organizations. In just nine years, the number of participating consortia in the US increased by 43%, despite the fact that some consortia have merged (for example, consortia in Illinois have consolidated, and separate consortia in Oregon and Washington came together to become the Orbis Cascade Alliance). But even more significantly, the number of consortia in other parts of the world has doubled, increasing from 21 to 42. Overall, the number of consortia has increased by 56% in less than 10 years, with most of the growth occurring outside of North America.

Merryll Penson from Galileo has observed that "*Consortia are like snowflakes, each one is unique.*"⁸ Vendors and publishers are very well aware that every single consortium is unique in terms of its mission, funding sources, staffing patterns, priorities, membership, history, and so forth. And while

vendors have our sympathy, library consortia staff and members nevertheless expect that they will do whatever is necessary to become familiar with the particulars of each group. Still, because every consortium is unique, it is something of a challenge to make comparisons or to find similarities and common directions. Yet that is just what this paper is attempting to do.

Survey of ICOLC participants

In the spring of 2009, Ann Okerson, Associate University Librarian for Collections and International Programs at Yale University and the organizer of the Northeast Research Libraries Consortium (NERL), and I surveyed the ICOLC members by requesting responses from members of the ICOLC listserv. While we have established that there are over 200 consortia listed on the ICOLC website, 42 surveys were completed and returned. This is not a huge sample for statistical purposes, but it constituted a respectable response rate (20%) for our purposes. Interestingly, the distribution of the responses was similar to the overall distribution of consortia worldwide. Of the surveys returned, 30 (71%) were from North America (US and Canada), eight (19%) were from Europe, three (7%) were from Australia, and one (2%) was from Asia. No responses were received from either Africa or South America. While being a fairly small number and representing only one-fifth of the total number of consortia listed as ICOLC participants, the results provide a framework for determining the issues and concerns of many of our consortia and will enable the short-term discussion about directions and priorities for ICOLC participants.

Demographics

The first set of questions in the survey concerned basic demographics: size of budget, number of member libraries and number of staff. A total of 28 consortia (67% – two-thirds of the consortia reporting) indicated that they have total consortial budgets of less than US \$5 million. Of that total, 12 consortia (29%) reported budgets of less than half a million dollars, and another 16 have budgets ranging from half a million dollars to \$4.9m. Five (12%) reported budgets of \$5m up to \$10m, three (7%) reported budgets of \$10m to \$15million, and six (14%) reported having budgets of \$15 million

or more. The answers related to the budget questions were, I believe, an under-representation of the total budgets for several of these consortia, due to misunderstanding by at least two respondents. But the summary is provided here nonetheless.

The consortia in this survey represent well over 5,000 libraries of all types. In general, more public libraries were represented than any other library type, followed by all sizes of the public academic libraries, and, in the following order, schools (K-12), academic private non-profit libraries, technical colleges, and other (special and corporate libraries, and so on). The number of State/National Libraries appears to be quite small, with only 15 libraries in that category. However, when viewed in the context of state or national consortia, it is 36% of all responding consortia (15 of 42 consortia) reported, including one or more State/National Libraries.

The next question asked how many staff members the consortium compensates for their services. As recently as 2004, the ANSI/NISO Z39.7-2004 data dictionary⁹ defined library cooperatives as having their own paid staff. I believe that notion is mistaken, since some consortia operate – and many began with – staff time donated by member institutions. Of our respondents, two (4.8%) currently operate with no paid staff. The majority of

the respondents, 25 (59.5%) reported having 1–5 staff members, seven (16.7%) have 6–10 staff members, and a total of eight (19%) indicated employing more than 10 staff members.

Current priorities

The survey listed issues of importance to consortia in alphabetical order: budget management, catalogs – NextGen, catalogs – union, digital initiatives, licensing – new, licensing – renegotiations, inter-library loan, open access, print collections – cooperative collection development, print collections – shared storage, research projects, training, and other priorities. Questions were asked in three groups. The first asked about current priorities, while the second concentrated on which of the current priorities are new within the past year or two. A third set of questions – asked in order to obtain details about priorities and directions – required open-ended responses.

The respondents rated the priorities according to their importance as of March 2009 on a very simple scale: ‘very important,’ ‘important,’ ‘not important’ and ‘not applicable’. As shown in Figure 1, the current priorities fell out in this order:

1. Licensing – renegotiations
2. Budget management

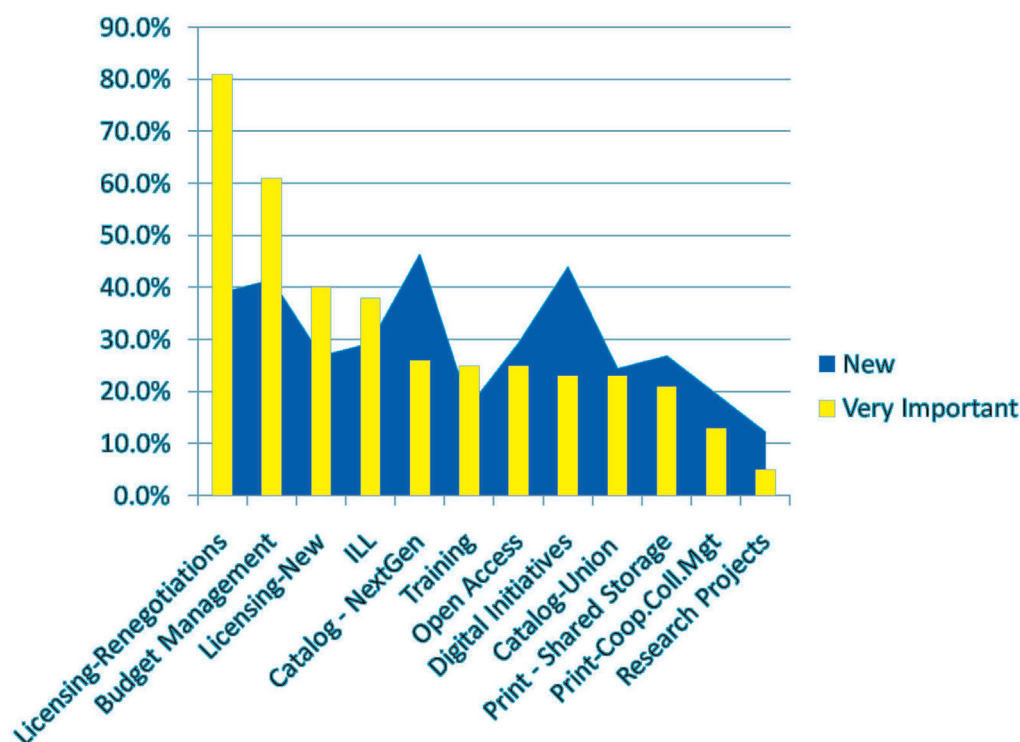


Figure 1. Percentage of survey respondents' consortial priorities in order of importance, with the indication of those added most recently in the background

3. Licensing – new acquisitions
4. ILL
5. [Tie] Catalog – NextGen
Open access/scholarly communication training
6. [Tie] Catalog – union
Digital initiatives
7. Print – shared storage
8. Print – cooperative collection management
9. Research projects.

The top two priorities, licensing – renegotiations and budget management, are especially striking to me. I believe that managing consortia has long included these tasks, but I would not have identified them as major issues had this survey been conducted before the economic downturn in the fall of 2008. The next two items are familiar, cornerstone issues that consortia have dealt with for more than a century – acquisitions and inter-library loan. The familiar issue of catalog appears next, but in its new guise as the 'NextGen' catalog. It is tied in the fifth spot with the newer issue of open access and a more perennial issue, training.

Figure 1 also shows which issues have been added in the past year or two and are indicated in the 'mountain range' background. There were 41 consortia answering this question. The top four issues, in order by number of consortia reporting them to be newly added, were: catalog – NextGen (19, 46%), digital initiatives (18, 44%), budget management (17, 42%), and licensing – renegotiations (16, 39%).

Future priorities

The survey next attempted to elicit some details about each of a number of issues and their importance to consortia for the future. Respondents were asked to indicate if each item was 'much more important', 'somewhat more important', 'somewhat less important', 'much less important', or 'not applicable'. The responses are addressed here in order of the number of 'votes' each received for being 'much more important' for the future, and the current priorities fell out in this order:

1. Budget management (including advocacy and marketing)
2. Negotiating licenses (both new licenses and renegotiating)
3. Digital initiatives (including digital repositories, special collections, and preservation)
4. Catalogs (NextGen and union)
5. ILL

6. Print collections (both cooperative collection management and shared storage)
7. Scholarly communication and open access
8. Training
9. Research projects.

Budget management Budget management had the most votes (24) as the issue which will be much more important for the foreseeable future (see Figure 2). A big part of the reason for conducting the survey during the spring of 2009 was to understand how colleagues in consortia around the world were approaching the economic downturn and the resulting budget problems. Survey respondents offered no easy solutions, but the survey very clearly revealed that the top two most important issues currently facing consortia – renegotiating licenses and budget management – relate directly to the economic crisis. Most consortia indicated spending much more time than ever before renegotiating licenses and that they are facing a much more complicated budget management situation. As Tom Sanville of OhioLINK said recently, "Flat is the new up."¹⁰

American universities saw a 23% loss in endowments after 30 June 2008, and they experienced even deeper losses after December 2008.¹¹ The economic crisis has had an enormous effect on private colleges. State-assisted colleges and universities, where the budget situations are often dire, are also reeling. A report of the State Higher Education Executive Officers (SHEEO) in the US, released in February 2009, revealed that public colleges and universities were "... just beginning to recover from the 2001 recession – per-student state appropriations were on the rise from 2006 to 2008, following four consecutive years of decline. Even with these gains, however, state-supported colleges are receiving less in constant dollars per student than they were in 2001 – a peak year in data that stretch back to 1983. The SHEEO report also reports that for our current fiscal year, 2008-09, 65% of state-funded institutions took mid-year budget cuts".¹² Consortia in other parts of the world also reported suffering from the effects of currency fluctuations.

In addition to the issues already raised, the survey also asked about advocacy and marketing. Some significant comments about the importance of marketing were received in response, including the following:

"...the areas of budget management, program sustainability, and advocacy and marketing will be

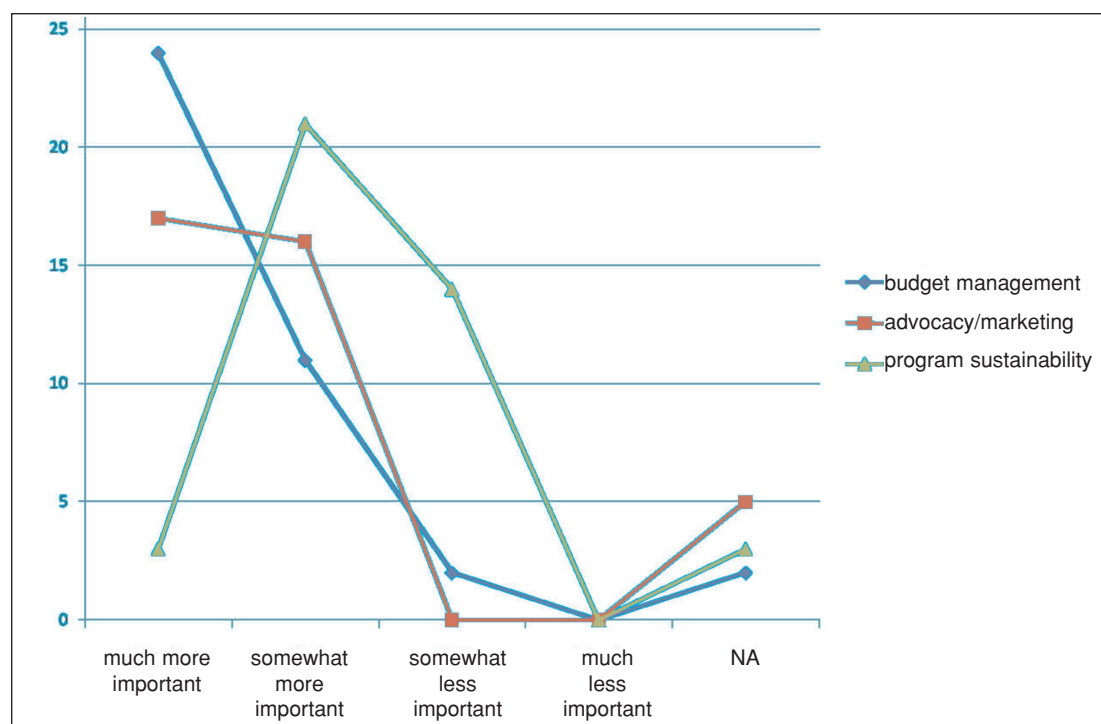


Figure 2. Budget management ranked highest of all issues facing consortia for the future

integrated into all of our efforts, locally and at the consortium level. ... A great deal of effort is devoted to advocacy and this role will grow. Our consortium plays a significant role in budget management and the ability to sustain programs. Assessment is critical - accurately and effectively quantifying what we do and how this benefits the CSU and California." (Lisa Moske, California State University, Systemwide Electronic Information Resources (SEIR). "This economy could be a double-edged sword for consortia. At renewal time we need to be sure our members recognize the value for money of their membership...." (Tracy Thompson-Przylucki, Executive Director, New England Law Library Consortium (NELLCO).

Gone are the days when librarians who work with consortia could think in terms of advocacy only with regard to legislators, funders, or other external decision-makers. Now, staff of consortia need to be certain that our members also realize our full value to their institutions.

Licensing Licensing ranked as the second most important issue facing library consortia in the future (see Figure 3). The comments revealed that while some consortia are still pursuing new products, economics are a paramount consideration and are driving decisions regarding the products handled by each consortium. Christine Hiller, Conférence des Recteurs et des Principaux des

Universités du Québec (CREPUQ), indicated: "We are still negotiating for new products, although not all negotiations are successful (due to financial constraints rather than lack of interest in a product)."

More commonly, consortia report that they are not doing any new licensing but are instead focusing entirely on renegotiating extant licenses in order to make ends meet. Alan Charnes of the Colorado Alliance of Research Libraries, put it concisely: "New product licensing is at a dead stop. We are re-visiting every existing major license for dollar saving opportunities. Also, looking to re-do long term contracts ..."

As indicated in the ICOLC Statement on the Economic Crisis¹³, consortia cannot afford and do not want new bells and whistles for their products. Consortia cannot survive if 'business as usual' is mandated during this economic downturn. Fortunately, many vendors recognize the plight of library consortia and are working with us.

Digital initiatives Digital initiatives were the third most important issue for the future, with digital repositories garnering 13 votes as most important, followed by special collections with 11 votes and preservation with 10 votes (see Figure 4).

Next-generation catalogs The spring 2009 survey revealed that 'NextGen catalog' issues were more

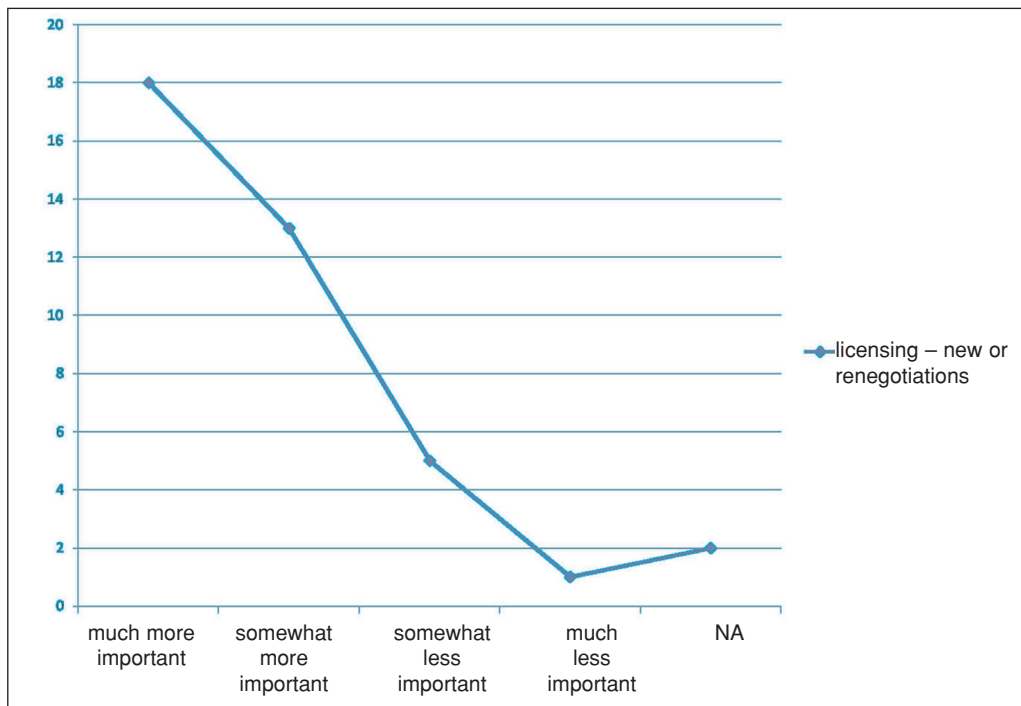


Figure 3. Negotiating licenses (both for new products and renegotiating licenses) ranked as the 2nd priority for consortial issues in the future

important (both 'much more important' and 'somewhat more important') than standard union catalogs. Comments in this area were quite diverse.

Tim Rogers (NC LIVE) said that overall, the most pressing issue looming on the horizon in the next two years is "Greater integration of content into discovery and use environment by building applications

and widgets that push, pull, and surface knowledge objects through library, university, and commercial channels."

Tom Sanville (OhioLINK) said that it is "Very important politically to evolve to a full statewide multi-type union catalog and to define next-gen ILS that meets evolved needs more efficiently and could be applied on a multi-type basis."

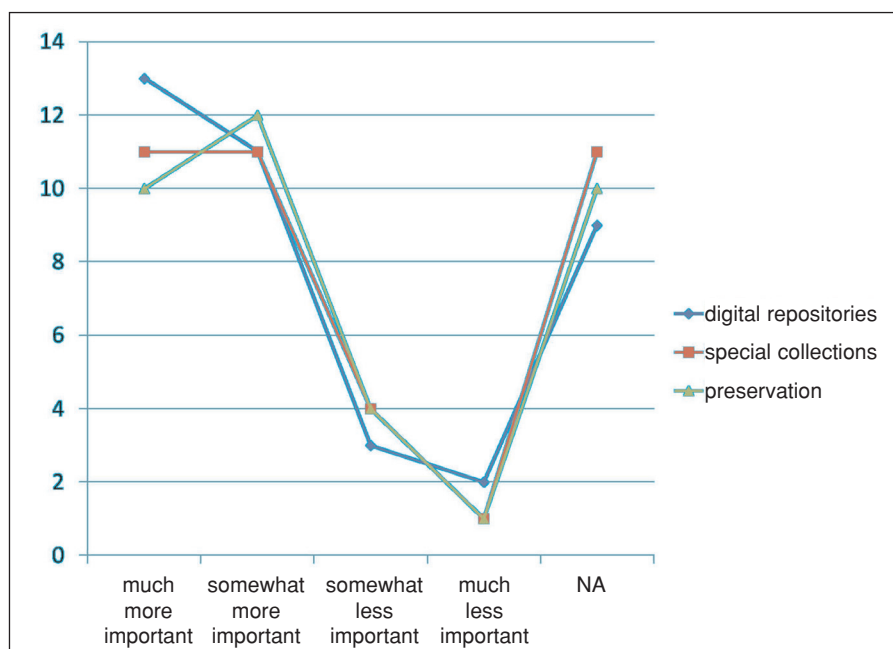


Figure 4. Digital Initiatives included digital repositories, special collections and preservation projects and the three issues had very similar voting patterns

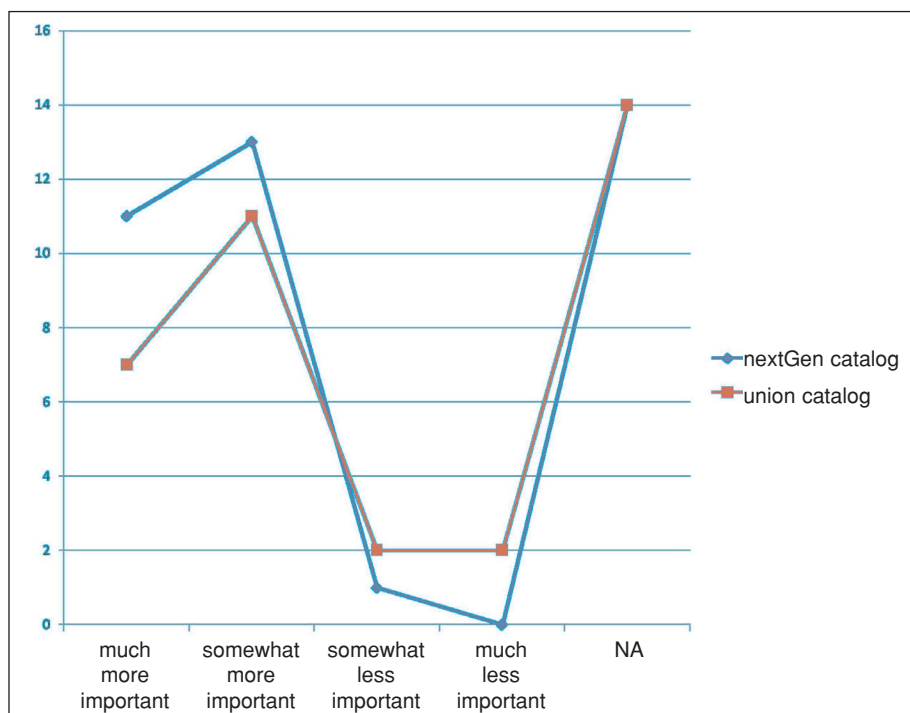


Figure 5. Issues relating to the NextGen Catalog ranked number three in the list of priorities facing consortia in the future

It is also worth noting that although the literature shows catalogs as the very first cooperative project undertaken by library cooperatives in the late 19th Century, in the survey a significant number of consortia found the topic of catalogs to be 'not applicable' to their consortium now or for the future, presumably because the *raison d'être* for those consortia was specific to concepts such as purchasing or collections.

Inter-library loan Only nine consortia ranked ILL in general as 'much more important' for the future, while seven ranked ILL delivery services at that same level of importance. These rankings are not that different from the next three issues: cooperative collection management of print materials, training librarians, and shared storage of print materials. ILL priorities are illustrated in Figure 6.

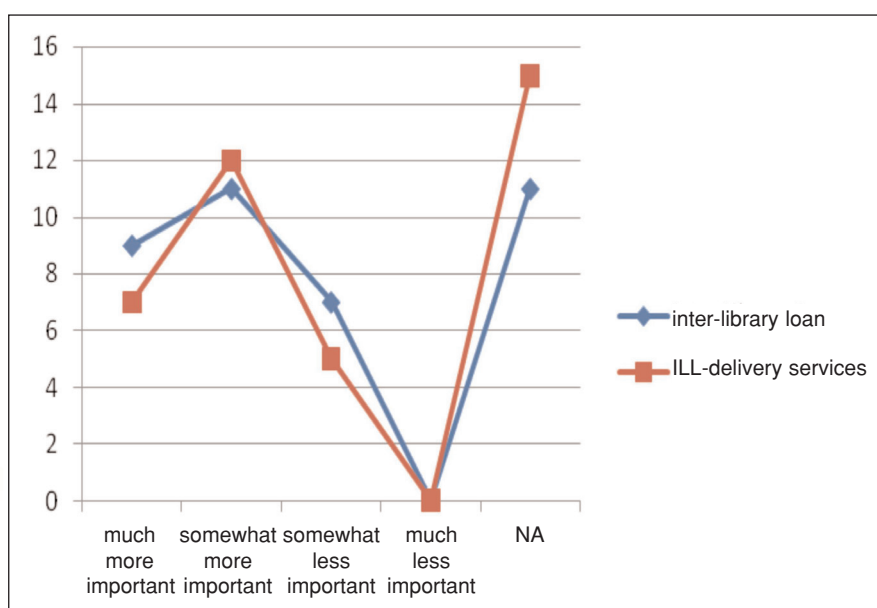


Figure 6. Issues relating to inter-library loan in general and to ILL delivery services specifically.

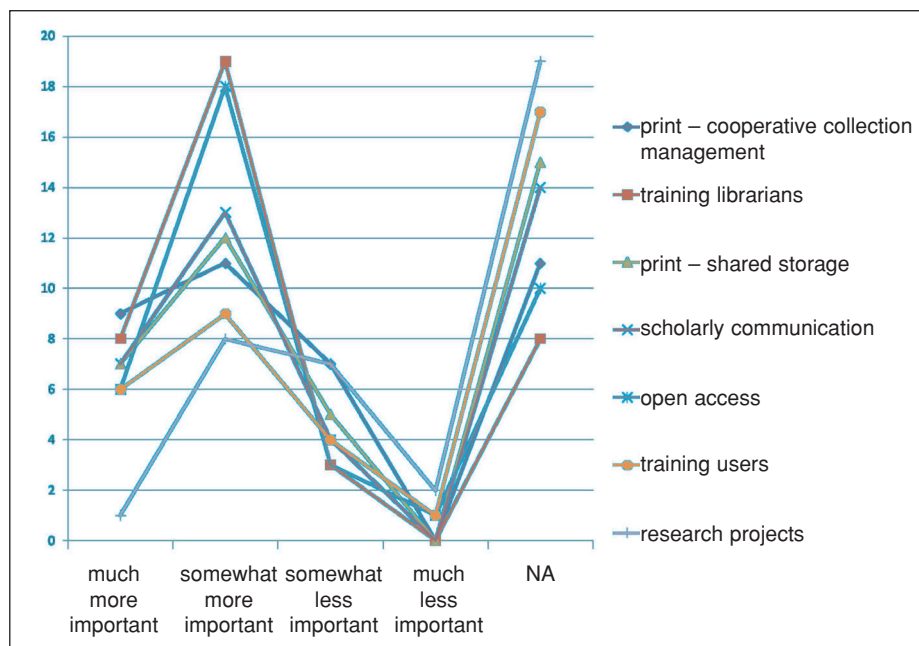


Figure 7. Remaining priorities in order of ranking by 'much more important' for the future were cooperative management of print collections, training of librarians, shared storage of print materials, scholarly communication, open access, user training and research projects.

Other priorities Figure 7 shows the remaining priorities, listed in rank order according to the number of participants that listed them as 'much more important' in the future. Each has a fairly similar pattern – as the importance for the future decreases, the number of consortia reporting them to be 'not applicable' increases. Although neither 'training librarians' nor 'open access' ranked high in the 'much more important' category, they both were highly ranked as 'somewhat more important' for the future.

Summary

The concept of library cooperation is not new in the United States, and is probably even older in the United Kingdom. What is relatively new and worth recognizing is the development of the International Coalition of Library Consortia in 1996 and the dramatic growth in the past nine years of consortia in countries beyond North America and Europe. Early cooperation among libraries focused on catalogs, inter-library loan and cooperative acquisitions, and these three issues continue to be cornerstone issues for many consortia. But an international survey conducted in the spring of 2009 revealed that two new issues have become the highest

priorities for most consortia for the immediate future: budget management and license renegotiations. Out of necessity, library consortia will be focusing a great deal of attention on managing their budgets in this time of economic uncertainty.

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