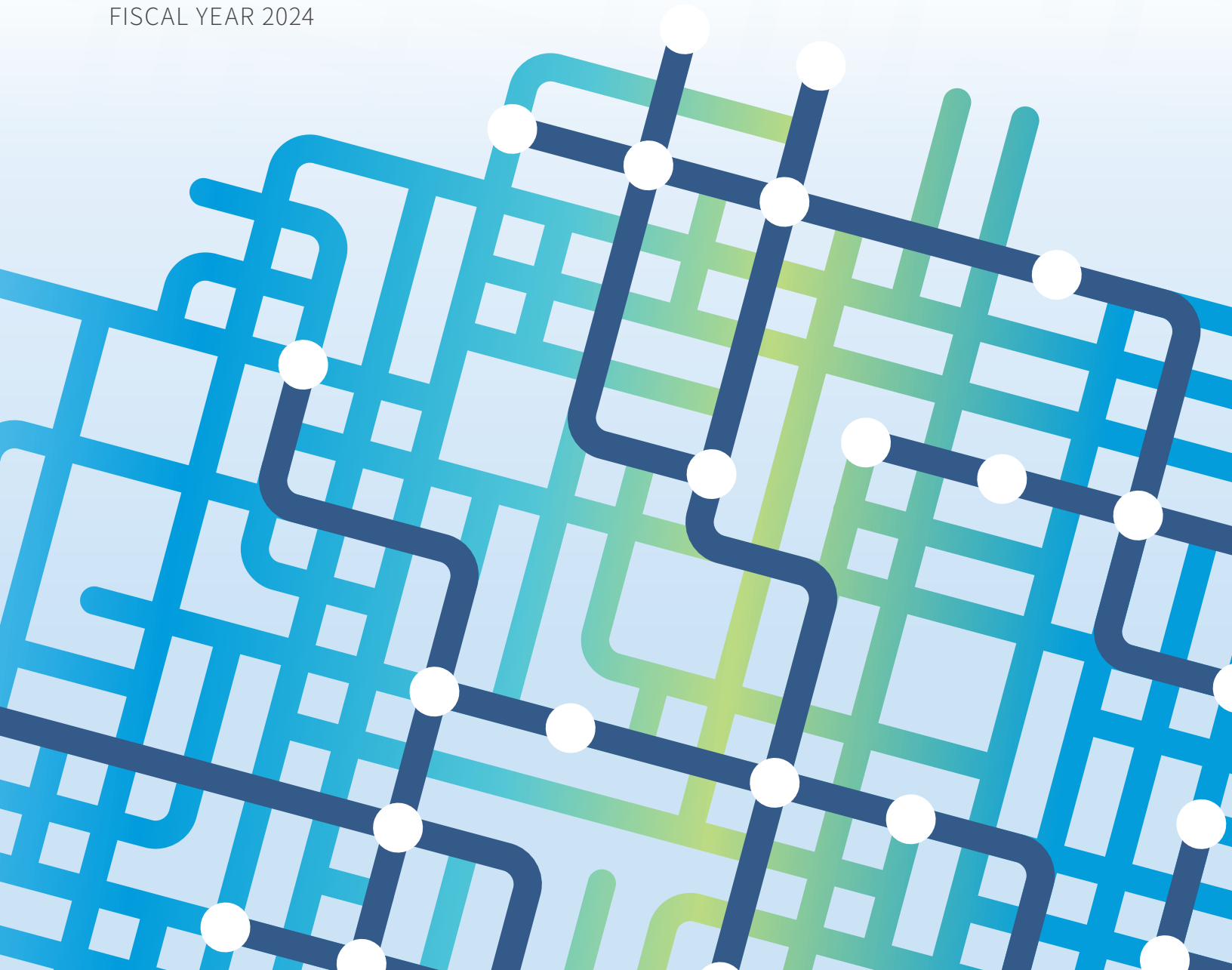




Membership Report

FISCAL YEAR 2024





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FROM THE EXECUTIVE DIRECTOR

When we published the last Membership Report, we were anticipating our year of LSP migration. I'm happy to say that we're on track and on time. As much work as it's been, it's extremely exciting to know we'll be live with Alma/Primo next year.

This Herculean project spotlights our member library staff's dedication, including the energy and excitement of the (eight!) Working Groups* ([page 3](#)) and the eagerness of people to volunteer to serve as local LSP Project Leads. As you'll learn in this year's Report, 400 individuals are actively working on the migration. Even the time that people are taking to read our many LSP communications and attend monthly Milestone Updates is phenomenal. This is the community pulling together to make sure that we are *all* successful in this transition.

As you read through the work completed in the past year, be confident that OhioLINK values everyone's contributions. The work we are reporting on here could not have been accomplished so successfully without your input, feedback, and engagement in our processes.

The OhioLINK team's myriad opportunities to collaborate directly with members gives us a thorough and pragmatic understanding of what's happening "on the ground." When I am attending advisory board meetings, conferences, or talking with professional organizations and vendors, I am proud to represent OhioLINK members. I love helping people understand not only what librarians really do and how hard you work, but also how good you all are at what you do.

This year we substantiated OhioLINK claims of consortial efficiency and return on investment. OhioLINK engaged an economist to analyze the value we bring at the state and institution level. In a nutshell: The big OhioLINK experiment conceived thirty-plus years ago has not only worked, but it also has exceeded expectations. We will be sharing this report with Deans and Directors first. Watch for webinars for the community this fall.

New this year: You'll see small superscripts in the Membership Report text. Clicking on them links you to the Strategic Framework document showing the connection between our planning and accomplishments.

Thanks for reading.

Amy



*OUR WORK THROUGH YOUR WORDS

Notable statements from Working Group members

“A consortium is at its most powerful when acting together. You will give and get—not necessarily 1:1, but if you focus on the individual parts, you lose the big picture.”

Alea Henle, Miami University

“Learning others’ needs and how they want to approach solutions adds to the pool of knowledge. Collaborating within the consortium elevates what we do. The sum is greater than its parts.”

David W. Green, State Library of Ohio

“Consortium solutions need a much broader perspective. Multi-type library working groups help us hear more use cases and learn to do things a new way. We all benefit from the shared resources, and that brings a shared responsibility in making decisions.”

Wade Lee-Smith, University of Toledo

“Alma is going to give OhioLINK an opportunity to make a shift in how the consortium thinks about and accomplishes collective work, which will help us grow and improve how we work together.”

Michelle Hahn, Ohio University

“OhioLINK is an ecosystem. We all need to contribute to the diversity of effort and consider the health and strength of the whole state.”

Sean Kennedy, Kent State University

DISCOVERY & DELIVERY



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Migration to Alma/Primo VE

Last year's [Membership Report](#) chronicled LSP activity only up to the announcement of Ex Libris as vendor. We've accomplished a great deal in what feels like an incredibly short year.^{SF}

After gathering best practices from other consortia and institutions that had migrated to Alma, OhioLINK staff, in collaboration with the [Library Advisory Council Coordinating Committee \(LACCC\)](#), Policy Teams—and in due time the Advisory Group, set up an organizational infrastructure to support necessary collaboration and [communication](#) and dug into preparations to migrate. Fall 2023 through spring 2024 was very active as foundational groups were established.

LSP Advisory Group, September–December 2023

As the first order of business, OhioLINK formed an [LSP Advisory Group](#) to review available documentation of the Alma migration process from comparable consortia. Over four months, the Advisory Group met regularly to establish a framework for eight functionally focused Working Groups and their decision-making structure. The Advisory Group's [final proposal](#) was approved by Library Advisory Council (LAC) in December. To facilitate the necessary accelerated approval process, LAC agreed to defer to the smaller and more nimble LACCC.

Vanguards Libraries, October–May 2024

Deans and Directors were invited to volunteer to serve as a [Vanguard Library](#). Vanguards would go through the full implementation process—from data migration through configuration—without going live in order to identify potential areas for improvement during the main migration. Ex Libris and OhioLINK selected 10 representative

libraries from the pool of volunteers. Over the next eight months, the Vanguard libraries invested a tremendous amount of work for the benefit of the entire consortium. The Vanguards helped Ex Libris see into OhioLINK's complicated library environments so the migration team could better understand our consortial system and helped them hone timing estimates for individual steps in the migration process.

Thanks to Vanguard recommendations, migration forms (for managing local data exports) and configuration forms (how the system will use the data) were significantly simplified, and the load order for catalog records was changed. The Vanguard Libraries' hands-on knowledge of the migration process has answered many libraries' questions about the migration, and library staff from The Ohio State University, Columbus State Community College, Case Western Reserve University, and Miami University [shared their Vanguard experiences](#) with the OhioLINK community in June.

Formation of Working Groups, January–March 2024

To find staff with the most relevant experience to guide the migration, OhioLINK asked members to self-nominate for the eight [Working Groups](#) identified by the [LSP Advisory Group](#). The related OhioLINK Policy Teams collectively selected more than 100 Working Group members from the volunteers, which were approved by LACCC. Working Groups are responsible for generating draft LSP policies in their functional areas and submitting them for approval to their relevant OhioLINK Policy Team. LSP-related policy recommendations are approved by the Policy Teams and then by LACCC. Working Groups began meeting in March 2024 and will remain active throughout the main Alma/Primo migration.

Local LSP experts

[LSP Project Leads](#) serve a pivotal role, functioning as the local project manager for their library's migration, the primary local contact and LSP expert, and a trusted colleague for any questions and concerns. Selected by their library directors, LSP Project Leads began meeting weekly at the

end of March. Originally focused on preparing and exporting their institution's data out of Sierra, they are currently learning about the Alma/Primo system. OhioLINK library staff can follow along by watching their [recorded meetings](#).

Central LSP experts

Mirroring the work of the local LSP experts, OhioLINK staff have spent a great deal of this year learning about the Ex Libris system, both its local and consortial functionality, to translate that knowledge to benefit OhioLINK member library staff and institutions. This includes understanding how OhioLINK will be better able to work from the center to support its libraries, developing the IT timeline and planning for in-person training, and regularly meeting with Ex Libris to ensure that the migration continues to reflect the priorities of OhioLINK's membership.

Local IT stakeholders

Knowing that local IT support would be a critical component for a successful enterprise system implementation, OhioLINK worked with Library Directors to establish a relationship with their CIOs. The first CIO briefing on the LSP Migration was held in September 2023 and the briefings have continued on a roughly quarterly basis. Feedback has been positive. CIOs have reported that they appreciate being given advance information that allows them to plan for staff allocation for a new on-campus enterprise system. In late May, LSP Project Leads worked with local IT staff on timelines and tasks related to LSP requirements for Student Information Systems (SIS) and authentication.

Training framework

Similar to local IT support, training requires planning staff allocations and must be managed locally. OhioLINK and Ex Libris developed a phased training strategy that is being administered through LSP Project Leads and Directors. From June through September, library staff are familiarizing themselves with Alma/Primo basics via online training recommendations provided by the Documentation and Training Working Group. In addition, LSP Project Leads will invite colleagues as needed to specialized functional trainings. Starting in September, staff will receive

a combination of live and pre-recorded online training about their Alma Institution Zones (catalogs), seeing their own institution's data in the Alma environment. Ex Libris' in-person training at regional locations around the state will begin in spring 2025. More information to come.

Beyond the work done through the LSP migration project, OhioLINK has continued to maintain its core Discovery and Delivery services, and has begun a new project to enhance our future resource sharing options.

New resource sharing technology

Throughout the LSP Migration process, OhioLINK has remained committed to its print lending partnership with SearchOhio libraries. OhioLINK, SearchOhio and the State Library co-hosted a joint Resource Sharing Summit in March. OhioLINK will [again](#) be at the forefront of consortial peer-to-peer technology by co-developing a [new resource-sharing tool with Clarivate and SearchOhio](#).^{SF}

Available in 2025 after the Alma migration is complete, the new tool will minimize disruption to OhioLINK print lending and make finding and borrowing materials among libraries much more user-friendly. Clarivate will work with a Resource Sharing Advisory Board for guidance and feedback throughout the development process.

Consortial print delivery

Print lending continues to provide reliable and quick delivery between OhioLINK member libraries across the state. Larger OhioLINK institutions gain access to smaller institutions' highly specialized collections; smaller institutions gain extensive access beyond their local library's collection. Borrowing dipped slightly to 146,000 items; transit time remained at three to four business days. Based on anecdotal reporting from consortia who migrated to Alma/Primo, OhioLINK is anticipating that Primo's user-friendly process—where "find and request" is accessible within an initial search—will result in an increase in print lending.

Updated OhioLINK ILL policy

An Intercampus Services (ICS) working group updated the OhioLINK interlibrary loan policy,^{SF}

filling the gap between lending from the Central Catalog and lending operations that happen outside of Central, such as scanning an article. Policy updates includes minor revisions to account for the upcoming Alma migration, a language shift from “PCIRC” to “resource sharing,” and scanning standards for ILL requests.

Enhanced records

OhioLINK cataloging and metadata staff provided significant guidance on LSP-related [cleanup projects for local bibliographic records](#) via OhioLINK’s member-only website, including how to check for errors or key conditions and continue to collaborate with relevant LSP migration teams to offer advice and support.^{SF} In ongoing work, more than 178,000 catalog records were enhanced this year, making it easier for OhioLINK users to find consortially purchased, shared electronic resources.

LICENSING & ANALYTICS



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Shared resource negotiations

OhioLINK continues to pursue [Strategic Framework](#) objectives to ensure consortial resources meet member needs and retain their value.^{SF}

As Amy mentioned in her introductory letter, OhioLINK worked closely with economist Howard Fleeter over the past nine months to integrate existing OhioLINK data into a new analysis to provide each of its library Deans and Directors with a customized, quantitative analysis of the value in OhioLINK membership.^{SF} This report, to be delivered in fall semester, is intended to facilitate library administration conversation with local campus administrators. OhioLINK will present findings to the OhioLINK community via webinars.

The Core Resource Review procedure, developed by a 2023 project team, was the backbone of CIRM’s resource renewals process during 2023 and 2024 and will be used going forward.^{SF} This comprehensive review of all core resources allowed CIRM to evaluate each renewal in the context of member needs and with a consistent framework, identifying any outliers. All core resources were reviewed, and the results used as CIRM reviewed renewals for 2024 from the Association for Computing Machinery, American Chemical Society, American Psychological Association, American Physical Society, Oxford University Press, Project Muse, Sage, Elsevier, Springer Nature, Wiley, Oxford Scholarship Online, and University Press Scholarship Online (UPSO). CIRM used the results of the core review in its decision to cancel the UPSO e-book collection. This review was also critical to understanding the continued value of the journal packages as CIRM reviewed three publishers’ proposals for transformative agreements for 2024.

Transformative agreements

Transformative agreements, also called read and publish, include access to journal articles as in a traditional subscription package, while adding in the ability to publish articles as open access without authors having to pay an Article Publication Charge (APC). This model has seen growth worldwide during the last few years. In 2023 and 2024, two Open Access (OA) Project Teams returned to OhioLINK’s OA assessment framework first laid out in 2021. The framework is applied in the analysis of all transformative agreement (TA) renewals, including the renewal of the Wiley agreement for 2024 and preparing for the Cambridge renewal for 2025. The framework includes traditional metrics of usage, plus additional evaluation of publishing trends and other metrics to ensure that packages have value for members and adhere to the key criteria set by LAC in 2019—cost neutrality and ease of administration.^{SF} Feedback from libraries and faculty is also an important part of the OA framework. The Project Teams conducted surveys of libraries and faculty to gather feedback on OhioLINK’s TAs. The response has been extremely

positive—97% of faculty reported they would consider publishing using OhioLINK OA agreements again. The majority of libraries reported the agreements are of value to their institution, and libraries reported hearing positive or extremely positive feedback from faculty, academic departments, and institution administration.

As part of OhioLINK’s open access analyses, scholarly communications consultant Delta Think was engaged to complete a quantitative analysis that looked at OA publishing trends in the market and in OhioLINK packages. A recorded webinar on the Delta Think study [is available](#), with a look at how Case Western Reserve University adapted OhioLINK’s OA analysis framework to negotiate its own specialized OA agreements. Because of the rapid pace of change in this space, OhioLINK has moved to an annual update of this analysis.

OhioLINK added two new transformative agreements from “Big Five” journal publishers this year at no additional cost for members, bringing the total for the consortium to five. The new Springer Nature transformative agreement expanded access to 700+ new journals from the Springer, Palgrave, Adis, and Nature Academic imprints, in addition to OA publishing benefits in hybrid journals (those publishing both OA and non-OA articles). A renegotiated Elsevier agreement added open access publishing benefits in hybrid journals while maintaining the same quality content. A renewed Wiley transformative agreement added publishing benefits in fully open access journals in addition to hybrid journals.

OhioLINK’s approach to managing open access for its members is unique, offering a layer of consortial support to ensure that authors are able to take advantage of APC-free OA publishing with high-volume publishers without adding undue workload on libraries.^{SF} This approach is based on consortial cooperation, managing work for groups of institutions collaboratively instead of requiring each library to manage their own approvals. Since 2022, a team of member librarians has managed the workflow around coverage of OA articles for the Wiley agreement, and the team’s expanded in 2024 to include the Elsevier and Springer workflows. This OA approval group and OhioLINK

staff remain in close communication with publishers to ensure the OA publishing services meet member needs.

Now that authors are more familiar with the options and benefits of using OhioLINK’s TAs, we are seeing broad uptake across institutions. OhioLINK member authors have published 1,629 articles as open access under an OhioLINK agreement in the first half of 2024—more than in all of 2023! Six institutions published for the first time under an OhioLINK agreement. Via OhioLINK’s five agreements, authors at 41 OhioLINK institutions have published 3,379 articles as open access since 2022.

Librarians deserve a note of thanks for their successful outreach efforts to make faculty and researchers aware of the consortium’s free-to-author OA publishing options. To assist them, OhioLINK added to its toolkits for librarians with author-focused web pages by publisher, recorded webinars, customizable email templates, and an easily shareable, summary PDF that addresses common FAQs about OA options.

OPERATIONS & PLATFORMS



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Local content/platforms

OhioLINK added just under two million items to locally managed content this past year and continues to actively manage the stability, reliability, security, accessibility, and user experience for our shared local platforms.^{SF} In addition, OhioLINK troubleshoots both local and vendor platforms, addresses authentication issues, and tracks content delivery so members can be sure they receive access to those materials to which they are entitled.

Technology updates

- **GO:** This custom OhioLINK service, released in June 2024, rewrites URLs and forwards them to an institution’s local proxy. GO simplifies the user experience by allowing authentication without navigating different user interfaces and branding between a local proxy and the OhioLINK authentication system; properly attributes usage to improve e-resource usage metrics; and removes administrative overhead by no longer requiring local staff to regularly update MARC records in e-resource catalog records. Find more information in the Ostaff [GO FAQ](#).
- **EAD FACTORY End of Life:** The EAD FACTORY was designed to showcase rich digital collections at a time when many institutions and organizations did not have the capability to manage their own digital assets online. After investigating alternatives to replace the EAD FACTORY’s out-of-date schema and software, OhioLINK and collaborator Kent State made the difficult decision to stop supporting it. For institutions that opted in, OhioLINK will maintain a static version of the repository until June 2029.
- **Local Platform Maintenance, Security, and Updates:** Minor platform updates were released for Member Portal, Music Center, and the ETD Center systems.^{SF} Significant database infrastructure changes, routine operating system updates, and enhanced security features were put in place to ensure our local systems are well-maintained and secure.

Member support

- **Ostaff improvements:** In preparation for a Drupal software upgrade, OhioLINK made significant changes to the content and architecture of its member-only website—many of which were suggested by members. The changes included building out the right side menu, adding breadcrumbs for easier navigation, curating and updating content, and creating a robust LSP Migration section.
- **Consortial Teams and Groups:** The User Experience Policy Team, LSP Project Leads, and

eight LSP Working Groups are new to OhioLINK standing teams this year. With these new additions, more than 400 individual OhioLINK members joined OhioLINK groups over the last 12 months.^{SF} This is *in addition* to the 500 members who were already working on a standing OhioLINK policy or implementation team.

OHIOLINK INITIATIVES

Grants for faculty remain popular

OhioLINK continues to offer the Course Redesign grants twice each academic year, with a sixth cohort planned for fall 2024—and no indication that demand is weakening. The grants have provided incentive and support for 145 faculty from 49 institutions to learn about teaching with Open Educational Resources (OER).^{SF} Grantees also are able to have an OER specialist librarian review their course syllabus to find open materials that would meet its learning objectives. Based on the grantees’ submitted metrics, teaching their course with OER for only one semester would help 24,500 Ohio students avoid spending \$1.56 million on textbooks.

More OER-specialist librarians

Faculty found their syllabus review with an OER-specialist librarian in the Course Redesign Grants so helpful that OhioLINK wanted to expand access to this kind of expertise.^{SF} OhioLINK and the Midwest Higher Education Compact [funded nine scholarships](#) for librarians to attend the Open Education Network’s seven-month “[Open Education Librarianship](#)” program. The 2024 participants will join eight OhioLINK librarians who have already completed the OEN program to share what they’ve learned with others through a knowledge sharing strategy.

Savings for students

In parallel with supporting the use of OER, OhioLINK renegotiated statewide Inclusive Access contracts with the largest textbook publishers. These agreements guarantee that OhioLINK institutions

will receive the most competitive price for inclusive-access-eligible e-textbooks and courseware.

OER for semiconductor education

OhioLINK Affordable Learning met with Intel and its grant recipients to advocate for the adoption of OER materials for microchip-related courses and job training programs. In May, the Ohio Association of Community Colleges (OACC) Semiconductor Collaboration Network, spearheaded by Columbus State Community College, added three courses to establish the [Ohio Semiconductor Education & Research Program collection](#) in OhioLINK's Open Course Content Library.^{SF} Any subsequent OER created through Intel grants will be added. In addition, updates were made to 12 high enrollment courses in the [Open Course Content Library](#), and the user experience for the [Ohio Open Ed Collaborative](#) hub was refreshed.

eTutoring evolves

Guided by a 2023 needs assessment, the eTutoring program instituted a number of user-focused changes based on feedback from participating institutions, including making policies, processes, and locally adaptable marketing tools more available.^{SF} A new eTutoring Advisory Committee meets to review policies and processes with the goal of ensuring the best experience possible for participating students, tutors, and institutions, and is celebrating its one-year anniversary. As one of its first tasks, the Committee changed the eTutoring MOU to make it easier to understand an institution's customized eTutoring experience.

High marks for Luminaries Program

The Luminaries Program continues to offer students from under-represented communities hands-on learning opportunities in academic libraries. Thirty-three students have now completed the program. Students once again reported very positive experiences in their end-of-year survey. Nine members of this year's cohort indicated that they are likely to consider pursuing an MLIS. Six institutions are recruiting for the 2024–2025 academic year.

2024 Summit scales back

Because of the added LSP workload across the consortium, OhioLINK asked this year's Summit Planning Committee to pare back the 2024 program to six webinars with two open discussions. Jason Griffey of NISO presented a very engaging keynote about AI in libraries. Many thanks to Melanie McGurr and Melanie Smith-Farrell, both of the University of Akron, who served as co-chairs, the full [Summit Planning Committee](#), and all the presenters who so generously contributed their time and expertise with the OhioLINK community.^{SF} Recordings are available on the [Summit page](#).

WHO WE SERVE



794,000+ **48,000+**

higher ed students



faculty & researchers



49,000+

state employees



1.6M+

K-12 students



7.7M+

public library cardholders

1.2 INTERACTIONS PER SECOND

STUDENTS, FACULTY & STAFF INTERACT WITH OHIOLINK RESOURCES 37,749,229 TIMES A YEAR

OhioLINK delivers print and e-content for

\$53.10 PER STUDENT

IN 2023 OHIOLINK NEGOTIATIONS SAVED \$1.3 BILLION

A 97% DISCOUNT ON PUBLISHERS' LIST PRICE

Negotiation pays off

OhioLINK keeps annual cost increases below market rates. Average journal costs for packages (3%) and single titles (4%) were much higher than OhioLINK's increase of 1.7% on journal packages.

1.7%
packages with OhioLINK

3%
packages without OhioLINK

4%
single titles without OhioLINK

WHAT WE DO

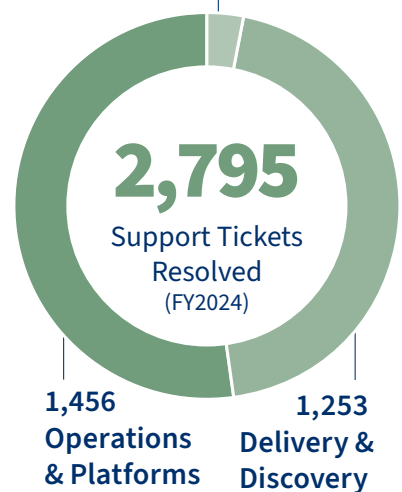
Staff Metrics

FY2024

Authority records loaded	58,092
Cataloging records provided	51,406
Catalog records updated	178,891
E-books claimed	1,351
E-journals claimed	41,169
Titles for Knowledge Bases	48
Meetings facilitated*	269
Members engaged*	9,345
Member surveys completed	106
Survey responses analyzed	2,940
Contracts processed	47
Invoices created	1,524

* Not including LSP meetings held in Basecamp and Teams

86 Licensing & Analytics



Locally Managed Content

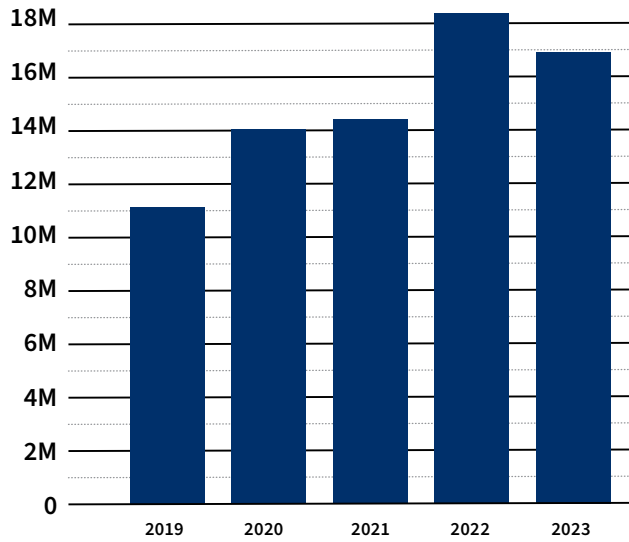
FY2024

Digital archive items	59,508,023
E-book titles	187,375
E-theses & dissertations	122,652
E-journal articles	41,793,922
Finding aids	9,993
Music Center items	81,814

WHO USES WHAT

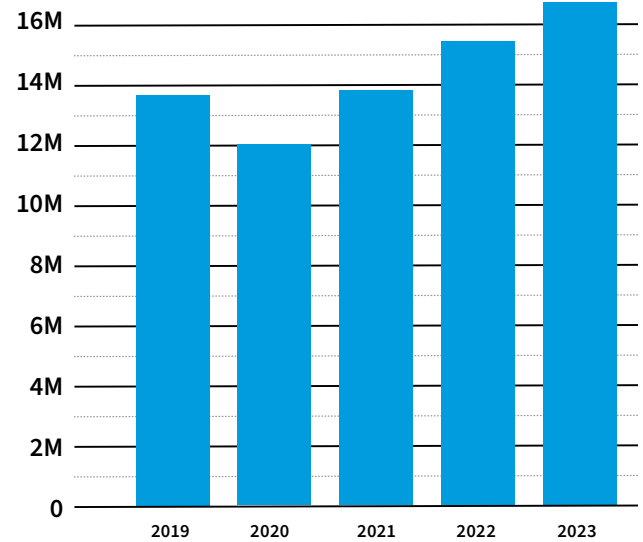
E-book Downloads

2019–2023



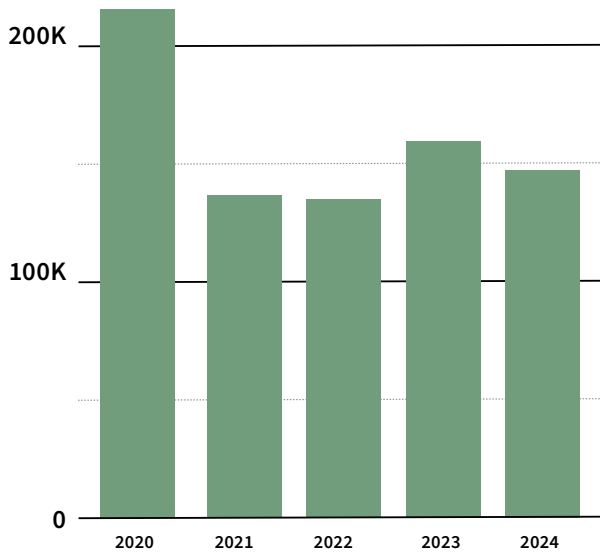
E-journal Article Downloads

2019–2023



Print Materials Borrowed*

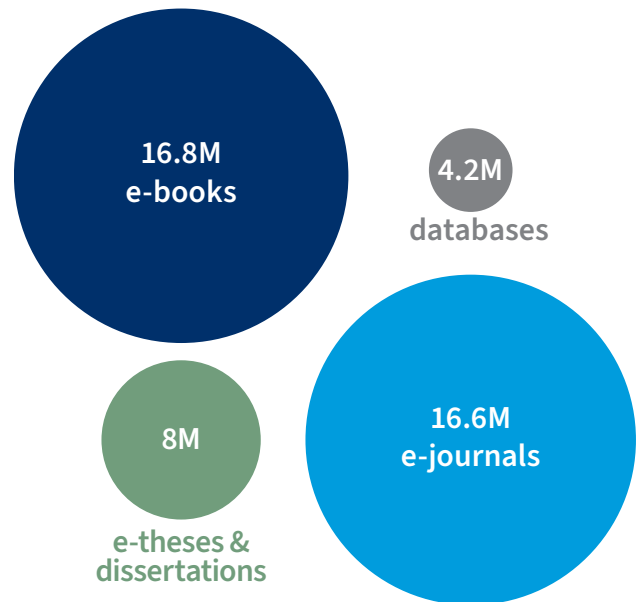
FY2020–2024



*borrowing was suspended March–August 2020 and March–April 2022

E-resource Downloads

2023



\$12,000,000

OF OPEN ACCESS APCs WERE WAIVED FOR AUTHORS FROM 41 INSTITUTIONS FROM JAN 2022–JUNE 2024

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