Amigos Library Services

Resource Sharing Through Technology

2007 Annual Report

From the Chair and Executive Director

Sara Lowman, Chair, Amigos Board of Trustees and Bonnie Juergens, Executive Director

27.5 million: That is the total population served by Amigos member libraries.* Our academic libraries serve over 4.8 million college and university students.** Those are truly impressive numbers!   The impact our member libraries have on their various communities inspires Amigos to deliver even more continuing education opportunities, better discount services, and more diverse programs to serve our member institutions.

During FY2007, staff from Amigos member libraries continued to build their professional knowledge by attending Amigos educational sessions. 2,671 people, most from member institutions, participated in 298 classes from Amigos. The 298 classes were comprised of 144 different courses, reflecting again this year the diversity required to meet library learning needs.

Amigos helped implement OCLC services throughout the region via support and training, especially through the free OCLC Training Pass program and the popular (and free) STOP & Learn online series.

Five new vendor partners were added to the A-Plus Member Discount Program during FY2007, further expanding this program to leverage the consortial buying power of Amigos members. A-Plus provides thousands of supply items and electronic resources at affordable rates via partnerships with over 50 service providers. Through A-Plus, members have the advantage of one-stop shopping at discounted prices.

During FY2007, Amigos Trustees focused on strategic planning, engaging member input through a variety of surveys, focus groups, and individual discussions. During this time of change for the library profession, Amigos faces changes in the ways we deliver services as well as the services we deliver. The Board has defined two strategic directions for your network: 1) the value of continuing to expand Amigos' diverse array of services to meet the changing needs of members, and 2) members' preference to have Amigos continue to play a strong support role in member use of OCLC services. In FY2007, in addition to providing more diverse services than ever before, we finished the year in the strongest financial position Amigos has ever experienced. The timing of this strong financial performance is important, because it positions Amigos to explore diverse opportunities and implement new programs to meet member needs.

The details in this FY2007 Annual Report reflect the many ways Amigos' 750+ members gain strength by working collaboratively to meet today's library challenges.

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*Based on "Population Served" data from the American Library Directory
**Based on enrollment numbers from the Higher Education Directory

2006-2007 Board of Trustees

The 2006-2007 Amigos Board of Trustees, comprised of 9 librarians, 3 non-librarians and the Executive Director, provides leadership and direction to the network. Trustees set policies and guidelines for conducting the organization's business.

Amigos Board of Trustees Committees and Task Forces

Members Committees and Task Forces

Amigos OCLC Members Council Delegates

In the legal governance structure of OCLC, Amigos Library Services, Inc. is a Member of the OCLC Members Council. In FY2007, Amigos members elected 5 of the 66 delegates to the Council. The delegation represents Amigos at the international level through active participation on the Council. The Members Council participates in OCLC governance by electing 6 of the 9 librarians on the OCLC Board of Trustees.

- Jeffrey Baskin, William F. Laman Public Library, North Little Rock (AR)
- Paul Dumont, Dallas County Community College District (TX)
- Marda Johnson, University of Arizona
- Eva Poole, Denton Public Library (TX)
- Anne Prestamo, Oklahoma State University
- Barbara Spivey (Alternate), Albuquerque Academy (NM)
- Bonnie Juergens (Standing Last Alternate), Amigos Library Services

Amigos Fellowship Program Selection Committee

- Earnstein Dukes (Chair), Texas Tech University Libraries
- Eileen Burg, Arkansas State University - Mountain Home
- Vicki Coleman, Arizona State University Libraries
- Nancy Dennis, University of New Mexico
- Cathy Moore-Jansen, Wichita State University (KS)
- Lynda Reynolds, Stillwater Public Library (OK)
- Staff Liaison: Laura Kimberly

Amigos Training Program Advisory Committee

- Linda Cavanaugh, Abilene Public Library (TX)
- Deg Farrelly, Arizona State University-West Campus
- Dominque Hallett, Arkansas State University-Jonesboro
- Linda Kyprios, Collin County Community College (TX)
- Robin Leech, Oklahoma State University-Tulsa
- Christine Moore, Glendale Community College (AZ)
- Peggy Morrison, Hendrix College (AR)
- Tammie Perry, Federal Reserve Bank of Dallas (TX)
- Staff Liaisons: Laura Kimberly, Tim Prather

Amigos Imaging & Preservation Service Advisory Council

- Cokie Anderson, Oklahoma State University
- Ellen Cunningham-Kruppa, The University of Texas at Austin
- Dwain Gordan, Arkansas State Library
- Gary Harrington, Oklahoma Department of Libraries
- David Hoober, Museum Division, Arizona State Library, Archives and Public Records
- Cecilia Aros Hunter, Texas A&M – San Marcos
- Michael McColgin, History & Archives Division, Arizona State Library, Archives and Public Records
- Janet Ruggles, Balboa Art Conservation Center (CA)
- Katherine Walter, University of Nebraska at Lincoln
- Cheryl Wilson, New Mexico State University
- Staff Liaison: Gina Minks

OCLC Collections & Technical Services Advisory Committee

- Barbara Spivey, Albuquerque Academy (NM)

Amigos Membership as of June 30, 2007

Arizona – 115
Arkansas – 101
California – 24
Hawaii – 1
Illinois – 1
Indiana – 1
Kansas – 1
Louisiana – 12
Missouri – 1
Nevada – 2
New Mexico – 78
Oklahoma – 81
Oregon – 1
Texas – 344
Washington – 1

764 Members Strong

2007 Highlights

Amigos Fellowship Program

The following individuals at member institutions were recipients of 2007 Amigos Fellowship awards:

Carol Lunce and Andrea Williams
Midwestern State University
Wichita Falls, TX
Project Title: *Assessing and Improving Instruction to First Year Undergraduate Students*

Devin Zimmerman
Texas State University
San Marcos, TX
Project Title: *Best Practices in Library Instruction to Students with Disabilities*

A-Plus Member Discount Program

Amigos offers members discounted pricing and ease of purchase on thousands of reliable programs and services. Members save money through Amigos' partnerships with leading providers of library technologies, from electronic journals and books to library and archival supplies.

- 163 members saved over $225,000 on subscriptions to Project MUSE in FY2007. Additionally, Amigos serves as coordinator for the INCOLSA, Oberlin, and CSU/SEIR consortial programs.

- 96 members saved $159,000 on subscriptions to the Oxford English Dictionary.

- 46 members invested in the NetLibrary Shared Resource Collection VII. Members benefited from access to over 1,180 titles, averaging $11.27 per title, per institution.

- 28 members saved $188,175 on subscriptions to the Association for Computing Machinery.

- 11 vendor partner educational update sessions were coordinated at the 2007 Amigos Member Conference, helping members take maximum advantage of available subscription services.

- 6 presentations and update sessions on the discounts available through Amigos were presented at state library association conferences around the region.

- 5 new vendor partners were added to the program: Atlas Systems, Inc., Creative DataProducts, Library Design Systems, Inc., MPS Technologies, and Sage Publications.

- 4 informational webinars and online demos were presented to inform members of new products and technologies available through the discount program.

BioOne®

Amigos serves as the exclusive marketing and sales agent for BioOne in the United States and Canada.

- 744 North American institutions subscribed to BioOne at the close of FY2007, an increase of 7% over FY2006.

- Amigos members continue to receive a 13% discount on BioOne subscriptions.

- In January 2007, BioOne launched BioOne.2, a second collection of journals in the biosciences.

Scholars' Marketplace

Scholars' Marketplace is a scholarly publishing distribution program developed by Amigos to partner not-for-profit scholarly content providers with libraries by offering scholarly, peer-reviewed content at affordable prices. Partnerships for FY2007 included: American Accounting Association, Communication Institute for Online Scholarship, GeoScienceWorld, and Project Euclid.

Continuing Education

FY2007 was an active year for Continuing Education at Amigos, involving building many partnerships with other agencies and expanding the course catalog.   180 people attended the 2007 Amigos Member Conference, May 2-3 in Dallas. 2,671 staff, mostly from Amigos member institutions, participated in 298 face-to-face, live online, and videoconference sessions offered by Amigos in FY2007. Members participated in 144 different course topics available, including:

- 64 Face-to-Face
- 58 Live Online
- 5 Self-paced and video
- 9 STOP & Learn
- 8 Co-sponsored courses

Amigos added to the diversity of topics with 11 workshops on 8 different topics presented by co-sponsoring organizations and adjunct trainers. Partners included: Serials Cataloging Cooperative Training Program (SCCTP), the Association for Research Libraries, the Association for Collections and Technical Services, and 8 independent consultants.

Amigos coordinated a pilot project with the Serials Cataloging Cooperative Training Program to add online instruction to the SCCTP offerings. Amigos trained 15 serials specialists to facilitate online learning and advised SCCTP on converting courses for online presentation.

Amigos provided training to the New Mexico State Library, the Washington State Library, Tampa Bay Library Consortium, and Bibliographical Center for Research (BCR) through various contracts.

This year, Amigos participated with WebJunction in a pilot project for WebJunction to resell regional network online courses. Amigos is one of three networks participating in the pilot.

Amigos contracted with the Texas Historical Records Advisory Board (THRAB) and with the Arkansas State Library to provide basic preservation & imaging training across Texas and Arkansas.*

Amigos continued working with the Society of American Archivists, BCR, and the Missouri Library Network Corporation (MLNC) to provide preservation training to their members.*

2007 Highlights

Amigos presented numerous program sessions at state conferences around the region on technology, OCLC products and services, and imaging and preservation topics.

11 new courses were added to the catalog for FY2007 and three additional courses were specifically developed for the New Mexico Group Services project. Additional courses developed in FY2007:

New Face-to-Face Courses
- Basic Book Repair in a Day
- Basic Digitization
- Copy Cataloging: A Guide for Beginners
- Emergency Preparedness, Response and Recovery in a Day
- Intermediate Digitization
- QuestionPoint: Administrator Training
- QuestionPoint: Librarian Training
- Social Software in Libraries
- Virtual Reference Communication

New Live Online Courses
- 50 Secrets of the FirstSearch Admin Module
- Basic Digitization
- Database Searching – Making The Most of Multi-Vendor Databases
- Intermediate Digitization
- Medical Information on the Internet
- Tech Topics: Internet Explorer 7
- Tech Topics: Podcasting
- Virtual Reference Communication
- STOP & Learn Topics continually updated
- CONTENTdm
- FirstSearch & Reference Services
- OCLC Cataloging Products & Services
- OCLC Cataloging Update: Client version 1.70
- Open WorldCat
- QuestionPoint
- Union List Migration
- WorldCat Collection Analysis
- WorldCat Resource Sharing

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Workshops co-sponsored or led by adjuncts
- The CONSER Standard Record: An Informational Update Session; Presenters: Melissa Beck and Valerie Bross
- Library of Congress Classification – The Basics ; Presenter: Angela Jones
- Library Website Design and Usability Workshop; Presenter: Chris Jasek
- Metadata Standards and Applications: An ALCTS/Library of Congress Workshop; Presenter: Brian Surratt
- SCCTP Advanced Serials Cataloging Workshop; Presenter: Sever Bordieanu
- SCCTP Basic Serials Cataloging Workshop; Presenter: Adriana Edwards
- SCCTP Serial Holdings Workshop; Presenter: Margi Mann
- Web Development with XML: Design and Application; Presenters: Various instructors

Training partnerships reduce member costs, increasing access to high-quality training. In FY2007, Amigos:

- Continued to participate in the Network Education Exchange with 11 networks. This partnership provides broader access to online training for Amigos members, who are able to participate in training from other networks at membership prices.

- Co-sponsored the NISO educational program Managing Electronic Collections: Strategies from Content to User, Denver, CO, on September 28-30, 2006.

- Continued to collaborate with OCLC and other U.S. networks to provide access to training via the Clearing house for web-based education on OCLC's website.

- Expanded the hosting of live online technology used by partnering networks from 4 (in FY2006) to 7 (in FY2007). Partners include BCR, INCOLSA, MLC, NEBASE, NELI NET, PALINET, and SOLINET.

- Continued to develop reciprocal member pricing for face-to-face training with BCR, MLNC, PALINET, and SOLINET.

- Offered registration discounts to members at NISO events and three Information Today conferences: WebSearch University, Computers in Libraries, and Internet Librarian.

Imaging and Preservation
The Amigos Imaging & Preservation Service (IPS) provides valuable information and assistance to members. The Imaging and Preservation Service is funded in part by a grant from the Division of Preservation and Access of the National Endowment for the Humanities. During FY2007, IPS:

- Conducted 5 site surveys at member sites.

- Presented 3 sessions on imaging and preservation topics at the 2007 Amigos Member Conference.

- Conducted a State of Texas Alliance for Response Taskforce (START) forum in Beaumont, TX.

- Co-sponsored Persistence of Memory: Stewardship of Digital Assets conference in Tucson, AZ with the Northeast Document Conservation Center (NEDCC).

- Represented Amigos in the Texas Heritage Digitization Initiative (THDI) and at the Texas Digital Library planning sessions.

- IMLS and Heritage Preservation invited Amigos to participate as a National Preservation Expert in Connecting to Collections: The National Conservation Summit.

- Continued the active role with the Regional Alliance for Preservation (RAP), promoting and coordinating the activities of regional preservation programs nationwide.

OCLC: New Programs and Enhancements
126 Amigos member libraries (158 individuals) took advantage of free, online learning through the free OCLC Training Pass and the STOP & Learn series.

Amigos supported the implementation of Group Services in New Mexico.

Under OCLC's new Implementation Services program, Amigos conducted QuestionPoint implementation services for 3 libraries.

Financial Report

Statement of Financial Position
Year Ended June 30, 2007 and 2006

Assets

	FY2007	FY2006
Current Assets		
Cash and cash equivalents	$3,968,160	$3,066,641
Investments at market value	3,427,894	2,944,988
Accounts receivable from participating institutions and companies	6,763,207	6,396,477
Due from NEH	66,426	63,133
Prepaid expenses	76,746	89,326
Total current assets	14,302,433	12,560,565
Property and equipment		
Land	362,760	362,760
Computer service equipment	294,681	329,094
Office furniture and equipment	21,950	21,950
Software	328,386	183,190
Building	1,458,726	1,458,726
Total property and equipment	2,466,503	2,355,720
Accumulated depreciation and amortization	(968,091)	(920,506)
Net property and equipment	1,498,412	1,435,214
Other Assets		
Deposits	4,357	4,357
Total Assets	$15,805,202	$14,000,136

Liabilities and Net Assets

	FY2007	FY2006
Current Liabilities		
Accounts payable and accrued liabilities	8,057,382	7,403,365
Unearned operating revenues	4,288,667	4,058,419
Total Current Liabilities	12,346,049	11,461,784
Net Assets		
Unrestricted	3,459,153	2,538,352
Total Liabilities and Net Assets	$15,805,202	$14,000,136

Statement of Activities
Year Ended June 30, 2007 and 2006

	FY2007	FY2006
Unrestricted Revenues		
Member fees	$636,820	$648,682
OCLC services	12,930,714	12,584,088
Amigos services	12,834,288	13,499,156
Investment income	461,602	261,645
NEH training - grant	299,100	282,689
NEH training - non-grant	72,356	61,400
Discounts earned	7,914	7,204
Total Unrestricted Revenues	27,242,794	27,344,864
Expenses		
OCLC services	11,475,138	11,155,736
Amigos services	15,023,258	15,854,052
NEH training - grant	327,272	313,381
Total Expenses	26,825,668	27,323,169
Excess unrestricted revenues over unrestricted expenses	417,126	21,695
Realized gain (loss) on investments	343,996	68,266
Unrealized gain (loss) on investments	159,679	124,143
Change in net assets	920,801	214,104
Net assets, beginning of year	2,538,352	2,324,248
Net assets, end of year	$3,459,153	$2,538,352

Member OCLC Activity

	FY2007	FY2006	Difference	% Difference
Cataloging				
Online Transactions (FTU)	2,320,566	2,187,654	132,912	6.1%
Exports (includes Authority)	2,601,143	2,155,415	445,728	20.7%
Original Input	78,298	77,439	859	1.1%
Interlibrary Loan				
Items Requested	1,232,531	1,205,443	27,088	2.2%
Items Loaned	987,717	1,002,377	(14,660)	-1.5%
Online Searches				
CAT & ILL Services	7,236,930	7,181,682	55,248	.8%
FirstSearch				
WorldCat	4,426,303	4,329,615	96,688	2.2%

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The Mission of Amigos
• **Provide innovative services to libraries**
• **Promote library cooperation and resource-sharing**
• **Strengthen libraries as leaders in their communities**
• **Support libraries as education and information providers**