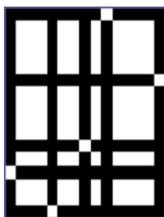


Broadening Common Ground

**The Five Colleges of Ohio, Inc.
Celebrates a Decade of Accomplishment**

Louis I. Middleman



College of Wooster □ Denison University □ Kenyon College □ Oberlin College □ Ohio Wesleyan University

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Foreword

In the fall of 2004, the idea for this history came to the Five Colleges of Ohio library directors. The work of putting words on paper fell to Louis I. Middleman, Ph.D., a former English professor who is currently working as a consultant in communication and organizational development – and who conveniently resides in Granville, Ohio. Much of the text is based on contributions from a wide range of sources, including annual reports to the Andrew W. Mellon Foundation, and phone conversations and email communiqués with the presidents and library directors who were the founders of the consortium.

We hope that *Broadening Common Ground* will give readers a glimpse into the beginnings of the Five Colleges of Ohio, into the process by which “something” was created, not out of “nothing” but from shared values, from past experiences of working together, and from the desire to creatively and efficiently expand resources and services. The accomplishments of ten years of dreaming, planning, organizing, implementing, evaluating, and dreaming again are worth recognizing. By all accounts, we’ve risen to the challenge to put aside institutional competition for students and athletic victories, to build a community based on a unshakable belief in the value of a liberal arts education. And in the process of solving problems and improving programs, we’ve forged friendships and valuable professional relationships.

It is an honor to be associated with an organization that has as its mission collaborative endeavors of highest quality that are efficiently run, forward-looking, and innovative.

Susan Palmer
Executive Director
The Five Colleges of Ohio

Acknowledgments

The efforts of all those who were instrumental in the 1995 founding of the Five Colleges of Ohio, Inc. and the subsequent development of programs are greatly appreciated.

Invaluable contributions were made by the consortial Board of Trustees (the college presidents), Library Committee (library directors and system manger), and Operating Committee (chief financial officers).

We gratefully acknowledge the generous grants from the Andrew W. Mellon Foundation that fostered our collaborative efforts. Even more importantly, we thank William G. Bowen, president of the foundation, for inspiring the college presidents to work together to promote quality and efficiency. And the implementation phases would not have proceeded so successfully without the guidance and encouragement of Mellon staff members Alice F. Emerson, Elizabeth A. Duffy, and Mary Pat McPherson.

The original library and telecommunications subcommittee members who transformed the idea of a consortium into a working library system with a shared T1 network deserve special recognition and thanks for their crucial behind-the-scenes achievements.

In addition, during the 1995 - 2005 decade, many of the founders and several hundred other individuals from a wide range of college departments and offices served on consortial committees and participated in collaborative activities. Their continuing interest, perseverance, and dedication provide a strong foundation for the future of the Five Colleges of Ohio.

The names of those individuals from Denison, Kenyon, Oberlin, Ohio Wesleyan, and Wooster who made significant contributions to the consortium are listed in the appendix of this history.

Preface

If people had nine fingers, or eleven, a decade might not seem so right for trying to grasp the meaning and importance of something that has reached ten years. We might not even have the word. But we do; and after a decade, here we are.

Although the Five Colleges of Ohio wasn't officially born until June 30, 1995, when the presidents of The College of Wooster, Denison University, Kenyon College, Oberlin College, and Ohio Wesleyan University met at Kenyon's Weaver Cottage to approve articles of incorporation, the consortium, without anyone exactly realizing it, had been gestating for many years. Administrators, faculty, and staff worked together in state, regional, and national educational and athletic organizations, including the Association of American Colleges and Universities, the Association of Independent Colleges and Universities of Ohio, the Great Lakes Colleges Association, the Ohio Foundation of Independent Colleges, the North Coast Athletic Conference, and the Carolinas and Ohio Science Education Network.

From the library perspective, the ground had been well prepared for collaboration. In the late 1980s, the member libraries helped form the Oberlin Group, an informal national consortium of seventy-six liberal-arts college libraries whose directors meet annually. And in Ohio, the establishment of OCLC and then OhioLINK provided models and resources on which the five colleges could build.

Discussions to formalize the consortium began in 1993, with a focus on creating an incorporated organization and a combined library system. A grant of \$840,000 from the Andrew W. Mellon Foundation, awarded in June 1995, was the green light to establish an administrative structure and develop the joint library network. In 1996, both the Five Colleges of Ohio, Inc. and CONSORT, the Colleges of Ohio Networked System for Online Research and Teaching, became realities.

Although CONSORT remains the heart of the enterprise, the consortium has received support for activities outside the libraries. Interested readers may visit the "Ohio Five" web site, <http://www.ohio5.org/>, for information on these projects; but libraries will be our emphasis here. Chapter 1 describes the consortium's philosophy and mission. Chapter 2, a sort of virtual reunion, records the memories of the founding presidents and library directors, and others: what did they think they were up to, and why; and how did the ideas become reality? Chapter 3 focuses on the founding Mellon grant and touches on others. Chapter 4 proclaims the consortium's major accomplishments to date. Chapter 5 looks ahead to new challenges and opportunities.

Readers who have been part of the Ohio Five before or since its founding will likely find, with some blameless exceptions, mostly a record of inaccuracies and partial truths: you will know just how it was, and you will miss in these pages the nuances, the scenes behind the scenes, that were the soul of the body here portrayed. But for those who until now have known little about the consortium, it is hoped that these pages may entice you to learn more about the people and events that have brought the Ohio Five to this milestone, and to anticipate an even more wonderful second decade.

Chapter 1. The Essence of Consortium

A state is united when most people are happy about the same things, unhappy together about certain other things. What keeps a state from achieving such unity is disagreement over what is to be called "mine" and "thine." In the way that an entire body can feel it when a finger is hurt, so the best-ordered state is unified: if anyone suffers pain, it must be the concern of the whole state. – Plato, Republic, Book I.

Letting Go: Easier Said than Done, but Done Even So

In 2000, the Five Colleges of Ohio Library Directors crafted a statement of philosophy that communicates the value of their collaborative activities: "Never again can our libraries stand completely alone in terms of library collections and other resources. We, therefore, reaffirm the Five Colleges of Ohio libraries' overall commitment to cooperation and mutual enrichment. We believe that any small loss of local control is well worth the many benefits we gain through our collaboration."

Today's directors affirm an observation made earlier by Joseph G. Nelson, Vice President for Finance at Kenyon College, that one of those benefits is that the consortium "creates bonds among the institutions that are stimulating us to challenge the status quo and think about how we might be better both collectively and individually." But ten years ago, everything *except* the status quo felt risky. How, for example, would faculty react to sharing library resources? Nonetheless, the risks seemed worth challenging and as trust among the participants grew, so did the benefits.

Realizing that trust is something earned, something won, not something merely declared, the library directors began the process of creating the joint library system.

Trust was established as, bit by bit, members discovered again and again that indeed they had gained more than they had lost. The libraries may have lost some of their traditional autonomy and control over their own items, but, as we shall see, they gained much on behalf of their constituents, the students and faculty of the institutions. More people can borrow faster and keep what they borrow longer. With less duplication of book purchases and journal subscriptions, everyone gets more bang for the buck.

And how did trust develop among the college presidents? Ohio Wesleyan's Tom Courtice noted that it didn't happen in the first week or month, but the five presidents met often, every couple of months, during the first year. They shared a "commitment to find places to work together," and their meetings "had the air of informal, intimate conversations." The "quality of the trusting relationships" he found "unparalleled in my

experience”; and this quality allowed college groups outside the libraries – the risk managers, for example – to start talking.

Articles of Incorporation:

Giving Body to the Spirit of a New Idea

As the consortial corporation was conceived, the presidents were named as the Board of Trustees, the finance vice presidents became the Operating Committee, and the joint online library system was the principal manifestation of collaboration. And what was to be the purpose of this new consortium? We will find no better description than the words of the third Article of Incorporation of the Five Colleges of Ohio:

PURPOSE. *The purposes for which the Corporation is formed shall be:*

To promote the broad educational and cultural objectives of the members of the Corporation by fostering closer cooperation and understanding.

To operate as an alliance for the purpose of coordinating operational functions and administrative services of the members of the Corporation.

To develop collaborative programs and resource sharing for the purpose of enhancing quality and reducing individual and collective operating and capital costs.

The basis for the library collaboration is the shared catalog. But about “cooperation” in a broader sense as described in the Articles of Incorporation, individuals (including college presidents, vice presidents, technology directors, and academic officers) observed that “Each member college is encouraged to build on its own individuality and strengths.” “Together we look to expand into areas where we couldn’t otherwise afford to venture.” “The consortium promotes risk-taking and cost-savings.” “We see our relationships as a conversation and a process.” “The consortium defines a dynamic, not static, future.” “We have learned to look to each other for assistance. An attitude of sharing has developed among colleagues.” “By fostering joint problem-solving and support, the consortium has become an important professional development network.”

Settling In: Employees and a Home Office

A sure sign of consortial organization was the November 1995 hiring of the first joint employee, Frank Wojcik as CONSORT library system manager. Frank’s office and the CONSORT server were located at Denison. Frank quickly got the system up and running: By March 1996, Denison and Kenyon were using the direct patron borrowing features of CONSORT – and within seven weeks had borrowed more from each other than in the previous six months. By May 1996, the catalog databases of the four colleges’ collections were merged and by July both Ohio Wesleyan and Wooster had been migrated to the new software. Oberlin, although a member of the Five Colleges of Ohio, did not join CONSORT.

Within a few months it became clear that central coordination of Ohio Five endeavors would be valuable. Thus, in the summer of 1996, Denison President Michele Myers and Denison Director of Libraries Dave Pilachowski began interviewing for a part-time consortial administrator. In August, Susan Palmer was hired as Administrative Director and an office was established at Kenyon College. By 1998 the position was full-time and the title changed to Executive Director. A part time assistant, Brenda Howard, was also hired and continues as a consortial employee. From the beginning, it was clear that the Ohio Five was to be a lean organization relying on college administrators and faculty to create and implement the consortial projects and programs.

Turning “Thine” and “Mine” into “Ours”: Storage

Since October 2000, the consortium has leased space in the former Newark, Ohio, Public Library, at 88 West Church Street, to serve as a shared storage facility called CONStor. In April 2002, after Oberlin had begun participating in CONStor, the library directors decided to formalize a Memorandum of Understanding to “ensure that shared items, whether in CONStor or in the individual campus libraries, remain perpetually available to all members of the Five Colleges community.”

Read that last quotation again. In twenty-four words, five institutions have become linked in major ways. This is an agreement that you want to take your hat off to, that makes you think that this collaboration has turned out to be a success.

The kernel of the Memorandum, which was approved by the Board of Trustees on April 23, 2003, provides that “The five libraries will guarantee perpetual access to all circulating library materials, including those in CONStor, as long as the materials remain physically useable,” and that “None of the five libraries will discard the last copy of any book or other type of library material, regardless of its location, without the agreement of all other member libraries. If a library does not agree, it will be given the item to add to its collection.”

Perpetuity is a long time – but, for the high purposes here shared, just long enough.

Emergency Support: Won’t You Be My Neighbor?

In a word, yes. Had Plato been a member of the Five Colleges of Ohio Operating Committee, he surely would have endorsed the statement they approved on May 14, 2003, “to provide assistance to each other during times of emergency. We hereby express our mutual interest in being ‘good neighbors,’ thereby facilitating the timely return to normal operating conditions following a disaster or other crisis at any of the colleges.”

To start the process of turning words into deeds, the committee asked the colleges’ risk managers, environmental health and safety managers, and security directors to “develop appropriate plans and procedures by which mutual aid can be requested and provided by and among the colleges.” Since then, these groups plus physical plant managers and custodial supervisors have met to compare notes at least two or three

times a year. And each has been given a wallet-sized card with all their office, home, and cell phone numbers so they can call each other in times of need. As a backup system, the executive director keeps copies of the campus disaster plans in her office.

So, although the initial focus of the consortium was CONSORT, the value of collaboration quickly became apparent to the wider college community.

Chapter 2. Founders' Memories: What Were They Thinking?

The idea of liberal education gains power when it speaks consortially.
– Thomas B. Courtice, President,
Ohio Wesleyan University, 1994 - 2004

In March and April 2005, interviews with a host of Ohio Five VIPs were conducted by Susan Palmer, Five Colleges of Ohio executive director, and Louis I. Middleman, author of this history. Included were the five founding presidents and library directors (Henry J. Copeland and Damon D. Hickey, College of Wooster; Michele Tolela Myers and David M. Pilachowski, Denison University; Philip H. Jordan, Jr. and Paul M. Gherman, Kenyon College; Nancy Schrom Dye and Raymond A. English, Oberlin College; and Thomas B. Courtice and Kathleen L. List, Ohio Wesleyan University); four key people at the Andrew W. Mellon Foundation (William G. Bowen, president; Alice (Tish) F. Emerson, senior advisor and former vice president; Elizabeth A. Duffy, former assistant director; and Mary Patterson (Pat) McPherson, vice president); Frank M. Wojcik, the founding CONSORT system manager; and Denison's then-Provost Charles J. Morris and Director of Computing Services Joseph L. Fleming.

These people were asked to recall their thoughts and feelings as they moved toward and into what became the Five Colleges of Ohio. Although we sent each person a list of questions, mostly we just said "Hello," and they started talking, or — in the case of Ray English, Charlie Morris, and Frank Wojcik, who chose to respond by e-mail — started writing.

Genesis: Bill Bowen Said, "This is Crazy."

If the creation of the Ohio Five had been called as a baseball double play, it would have been Bowen to Jordan to Gherman, on a diamond supervised by Emerson and Duffy. The play, however, was not to put two people out but to put two connected successes in: to do more things, better, for more people, by using technology; and thus to do them for less or at least cost-effectively.

The spark, according to Bill Bowen, a Denison graduate ('55) and trustee, came at a Denison board meeting but was based on research undertaken by the Mellon Foundation. "Technology," he said, "was changing. In December 1993, the Foundation began a study of academic libraries. That study demonstrated that existing models of everybody buying paper everything just wasn't going to work." Additionally, "we became persuaded that there was no way for these excellent liberal arts colleges to achieve their potential going it alone. It couldn't be done." Bill recalls that at the Denison board meeting "Michele Myers asked about expanding the library because there wasn't enough space." Bill said, "This is crazy." His reaction was that everybody had the same

things yet no way to efficiently share. So in essence the ideas for the Ohio Five and for JSTOR (Journal Storage, an online system for archiving and searching academic journals) were born together.

What changed the consortial spark to a flame? “The idea,” said Phil Jordan, “was stimulated by a conversation with Bill Bowen at the Mellon Foundation in New York.” Bill “had been thinking about it, about how small liberal-arts colleges, for example, Denison and Kenyon, were going to survive in the face of rising costs.” Aspects of residential colleges were, Bill said, “quite uneconomic.” The question was how to keep the value of such institutions by “effecting economies of scale.”

Phil said that “thinking about how library resources might be amplified by cooperation seemed like a very promising thing to do, with colleges of similar character but different enough to make it interesting.”

Henry Copeland was keen on the potential benefits to his institution, where the “Independent Study program relies absolutely on having a good library and servicing students’ ILL needs.” “There was no way,” he said, “that Wooster could keep building buildings and achieve the collection it needed all by itself.” In 1995, Henry raised the money for the Flo K. Gault Library for Independent Study, supplementing the original Andrews Library, which was full. Then came the Timken Science Library in Frick Hall. “Wooster was putting a lot of capital into libraries. But you could tell that in a couple of decades, we’d need another new building. Anything that would relieve that inexorable growth was welcome.”

Ohio Wesleyan’s Kathy List put it this way: “Were there benefits to faculty and students? Yes, but while that was one of the most important considerations for the libraries, that wasn’t what was initially most persuasive at the institution level. What was persuasive was cost savings. The point was to get costs under control so education could benefit by being able to do things, make improvements that they couldn’t make otherwise.”

Access not Ownership

And so we move in our “double play” to Kenyon’s Library Director, Paul Gherman. Phil Jordan reassured Paul that a consortial library “would enhance available resources, not detract from any.” “Access,” Phil said, “is more important than ownership.” We’d have “a much wider collection available on a more convenient basis. This was attractive.” And although there was some nervousness on the part of library staff that this might mean loss of jobs, the presidents discussed, then discarded, that possibility. “The primary benefits we perceived,” said Charlie Morris, “were (1) cost savings and (2) increased access to information in a reasonably timely fashion and at a reasonable cost. There was also a sense that the project would contribute to the increased inter-institutional cooperation that was in the air at the time.”

Paul remembers that “Mellon was approaching a number of small colleges, interested in funding projects to bring such institutions together. Phil sent out a notice and asked if anybody had ideas. At Kenyon we were at this same time thinking about how to join

OhioLINK, which was just then expanding to include private colleges. These two ideas came together. Dave Pilachowski and I went to New York with Phil and met with Bill Bowen and Tish Emerson. That was the genesis of our exploratory grant, then our proposal.”

Dave said that before the New York trip, Paul came to Denison talking about updating Kenyon’s library software. He’d realized that for Kenyon to connect to OhioLINK, the library would have to use the Innovative Interfaces, Inc. (III) system. Dave talked to Joe Fleming to see if Denison and Kenyon could share a server and the III software, and Joe said, “Yeah, that would work.”

Dave said, “I was always the nuts and bolts guy to Paul’s visionary.” So when, “at the invitation of the two presidents, Lorna Peterson, Executive Director of Five Colleges, Inc. (Massachusetts), came to talk at Kenyon, that was an important thing” for both of them. They realized that together, Denison and Kenyon “could provide much better service than we could provide individually. We had 1.2 million volumes together, a true research collection, enough to change the dynamic on our campuses. Even if OhioLINK hadn’t worked out, it [CONSORT] would have been worth it.”

Libraries and Information Technology: Pilachowski and Fleming Have a Byte of Lunch

Backing up a couple of years to the Snowmass Information Technology (IT) conference in 1991, Denison’s Joe Fleming talked with Tom Sanville, the director of OhioLINK, and Tom Moberg, head of IT at Kenyon. Joe and Tom had been thinking about OhioLINK and that it would be a good idea to go with III, which would make it possible for Denison and Kenyon to hook up once OhioLINK started including private institutions.

In that same year, Dave Pilachowski was hired by Denison. As part of his initial interview, he had lunch with Joe, who said that because at Denison “we already knew we wanted to get into OhioLINK,” the two talked about “positioning Denison” for joining. Even then, Joe said, “The whole idea about the consortium, and the resources it would hold, was in the air.” Joe said that at first, library directors were more skeptical about what became CONSORT than the IT people were. They worried they might lose autonomy. But Dave Pilachowski got his counterparts to see that it was good for libraries. Joe said that “the vision that drove it was having worldwide resources at your fingertips. Networking was growing by leaps and bounds, and this was back when everything was free! CONSORT was launched in the environment of all this new stuff. There was a sense of tremendous optimism.”

Joe talked about the impact of technology at this time, comparing the early ‘90s, a peak period for library automation, to 1820 – 1850, when the Erie Canal opened up westward expansion and created a peak period for the founding of mid-western liberal arts colleges. “There was the fun of doing new student and new faculty orientation. Faculty, who maybe thought they were coming to this little out of the way place, discovered that

they had access to capabilities and resources, including databases, that simply blew them away.”

Why, we asked, was the server placed at Denison? Because, Paul Gherman said, Denison already had Ill and was closest to Columbus. Joe Fleming said that even more important was the fact that at Denison, “the sense of collaboration and cooperation between the computing and library outfits [i.e., Joe and Dave] was very strong.” Paul called it a matter of “tremendous faith in Dave. Once the money arrived, it was Dave who did it all. We all got along together and could communicate well. It was a real team effort.” (In his characteristic fashion, Bill Bowen put it this way: “Once Jordan and Gherman grabbed the ball to do the Ohio Five, Pilachowski roped in the library directors from the other colleges.”) And, as it turned out, the directors’ personalities were perfectly complementary: Paul, the driving force; Kathy, the detail person; Damon, the one concerned about not giving up anything that was previously available; and Dave, the moderator.

Kathy, who proposed the name CONSORT, in the sense of “abiding with,” expresses similar thoughts. We asked what got her into it. She smiled (you could hear it) and said, “Because Paul [Gherman] called me one day. We were already in GLCA. We knew each other; we were on each others’ radar: similar institutions, small private, undergraduate. We were already members of one consortium [GLCA], and the other four were in the Oberlin Group. So when Paul called and said “how about it?,” I said, “Why not? Sounds like a great idea.”

Shortly after he called the other directors, Kathy said, “Paul got the planning grant. Around that time, small private liberal arts colleges were experiencing a downturn in 18-year-old enrollment. So there would have been a fierce competition among admissions officers. But libraries were the natural place to start. These schools were in competition, but the libraries were not, because librarians are inherently sharers.”

Damon Hickey said, “We had to have a project, something for Mellon to fund,” and thus came the idea of combining the four systems into one. Although the thought was surely in other minds as well, Damon recalls saying, “I think having a common library system is a no-brainer. Why have four systems when you can have one; why four systems administrators when you can have one; why four Ill subscriptions when you can have one?” The broader idea of the consortium, Damon said, was that “If you build it [the library part], then other things will happen.”

All this took place in the early days of e-mail. Paul said, “We [library directors] conducted all our planning and discussed all our issues over e-mail, and then we met physically once a month. If we hadn’t had the e-mail, it wouldn’t have happened. The key to it was this new technology.” Damon agreed: “Without e-mail it wouldn’t have happened because of all the furious debate that went on in order to figure out all the things that needed to be figured out. We hammered back and forth on these issues, tooth and claw.” As Bill Bowen had affirmed from the start, it was precisely new electronic technology that made it obvious that libraries needed to share.

“Three other libraries are helping us store our books.”

When the business officers saw the opportunity to use the libraries' need for high-speed telecommunications as a reason to negotiate cooperative contracts throughout the campuses, this, said Kathy List, “was a big win-win.” She went on to note that “As library directors, we had to persuade staff and faculty, not just presidents. Cooperation and compromise would be necessary. Faculty were afraid that what they needed would be somewhere else when they needed it. We had to bring together people of every specialty to make this work. The cooperation needed to achieve real depth was at all levels - intellectual, practical, professional, philosophical.”

It was certainly risk-taking, and required what Paul called a “profound level of trust to take our library system and give up control on behalf of a shared system. And using frame-relay services [the first CONSORT telecommunications network] was also very new and risky.” But the clear benefits — “Save money, free up resources, because of OhioLINK have access to resources we never had before, and cooperative collection development” — made the risks worthwhile.

Charlie Morris, Denison's then-Provost, spoke of these early fears: “Some felt inter-library loans from OSU were sufficient, but the primary worry was that materials that currently existed on campus might be located elsewhere and thus more difficult to obtain. Over time, most faculty felt that the benefits far outweighed the disadvantages, especially since the time period for getting information was fairly short. I recall saying once that I was still getting information faster than a friend of mine was from his own library at a major research university.”

There was a worry that things wouldn't be available, that they would be missing when people wanted them. But after only three months of CONSORT operation, Rita Snyder, a Denison faculty member in psychology, said “You know, now we look at our own library as CONSORT. We have a library, but it turns out that three other libraries are helping us store our books.”

The Mellon Foundation Twosome: Tish and Liz

Tish Emerson and Liz Duffy, who talked with us together, reported that they saw themselves as a team, working toward the same goals. “The four Mellon foci for liberal arts colleges,” they said, “were collaboration, teaching and technology, foreign languages, and libraries. The Five Colleges of Ohio did all four.” Their mission at Mellon was “keeping liberal arts colleges vibrant; and those in Ohio were so good, they were well worth supporting.” They remember “incredibly friendly and helpful people” from the Ohio Five institutions that “shared a strong history.”

The four Mellon foci were part of the “larger Mellon mission to support the liberal arts and the social sciences.” At the time, they said, “The use of technology in teaching was unknown. The question was, Could you bring the world to those schools, and those schools to the world? Could you deepen pedagogy by using technology? For example, digital media for art history, allowing multiple images including word and data files;

shared spreadsheets for economics; software in language classes allowing students to check themselves and have lots of fun; language instruction more interactive, allowing the group to view, review, and see changes in real time.”

“All these things seem basic now,” they said, “but then there was a real resistance to it.” “In 1993,” they noted, “hardly anybody was using technology in teaching; by 1995, it was understood that technology wasn’t going away. This was very much an evolutionary time for technology and a transitional time for institutions, including frustration and fear.”

Kathy List said that when the CONSORT idea was in its initial ferment, “OWU was just about to change library software and started shopping around and bought III, which was right for joining OhioLINK as an individual college.” To hook up to OhioLINK as part of the consortium, however, OWU would have to purchase a shared version of III. “I couldn’t imagine telling my president that a year after buying III we were going to have to do it all over again. But III said that CONSORT was a whole new thing that required new software. This was going to be a show stopper.” That’s when Tish and Liz said, “Ask us for more money.” Liz and Tish observed that this was simply Mellon’s way of demonstrating that it was “willing to work with schools to minimize the barriers to collaboration.”

Regarding the budget for the initial grant, they said, “We tried to get people to state measurable outcomes they expected to achieve. It was hard sometimes to push people beyond ‘I think this is a good idea’ to ‘How would we know if it worked?’ and ‘How will you be different if it works?’ But people found this kind of scrutiny helpful.” “We always made site visits to talk with the people who were actually going to do the work, as distinct from the people who had written the grant. The librarians were always the furthest along.”

A Matter of Records

Many things had to happen to make the consortial library a reality. Kathy List said that bringing in Frank Wojcik, formerly employed by III, was key. He was “great at bringing people and their ideas together.” In this role as CONSORT system manager he was, Kathy said, “essential, inestimable. For example, there were OCLC standards for special collections records, periodical records, and holdings records but preserving the enhancements our individual libraries made to those records was important in any merging of our databases. Frank helped design and move staffs toward a single record, not four different records, to show all libraries’ holdings.” And, in Kathy’s estimation, “We got 50% more out of the system because of Frank’s knowledge and relationship with the vendor on some of the tough issues.”

Frank remembers that “the earliest discussions were about strategies for merging the libraries’ bibliographic records while maintaining unique and important local information in those records. This was a major concern for the directors, and I confess to cajoling my III colleagues to assist me in developing ways to achieve this.” “My job,” said Frank, “was simple in some ways. I was not distracted by being a day-to-day part of a library

staff; my job was simply to merge these four systems into one effective system. So I was able to be single-minded in a way that could only happen because I was a consortial employee. All of my energy went into making this project work for all of the participants.”

Susan Palmer asked Frank how important his relationships with the directors were. “My relationships with the directors were very important for the success of the project and also for my personal contentment/satisfaction in the job. There were a few rough moments at the beginning when some library staff members were bitterly critical of the concept of the merged system. But the directors were always supportive of me. They welcomed me into their directors’ meetings, and they invited me to their libraries. I felt that I had an excellent relationship with all of them, and I still count them among my friends.”

A “Prudent Risk Worth Taking”

Speaking the language of his expertise in economics, Bill Bowen noted saliently that “the world of academia is all about scale. The marginal cost of adding an extra user is so low, and the benefits are so high, that there’s no other way to go.” This truth can also be applied to the investment of the Foundation. On one hand, \$840,000 is a lot of money for a consortium to receive relative to the size of other grants. But in absolute terms, considering the enormous leverage - the thousands of people it has helped - the marginal cost is virtually nothing. If Archimedes were here today, he’d probably say, “Give me a dataplace to stand, and I will move the world of information.”

Ohio Wesleyan’s Tom Courtice said he arrived “after the idea was hatched,” that he “picked up a thread already begun to be woven.” Tom came into it around the time Nancy Dye did, after the other three had started. (Nancy came to Oberlin from Vassar, where she was a Dean, shortly after the consortial partners had agreed. Nancy signed the incorporation papers but it had all been planned, and the library project was already in place.) Tom said that his “oar in the water” was “enthusiasm to get it done,” a fresh voice about the value, the “prudent risk worth taking.” The value was not just money saved; it would have been “short-sighted to see the value there alone. For him, the consortium was “as attractive an opportunity as came along for enriching Ohio Wesleyan University during the first year of my presidency.” By “enriching” he meant two things. First was “the obvious building on five colleges’ strengths instead of one.” Second, the “directions and levels of growth” of all five are there for each one.” The enrichment was (and is) in terms of three things: “quality, quantity, and diversification.”

Tom sees these three as connected. The consortium brought, first, “a much stronger library effort. The combined power of the five libraries meant higher quality.” Second, the consortium “strengthened the message of what good liberal arts colleges are all about and raised their profile in the public eye in a major way.” “The idea of liberal education,” he concluded, “gains power when it speaks consortially.”

Chapter 3. Let's Get a Grant – and Another, and Another!

We became persuaded that there was no way for these excellent liberal arts colleges to achieve their potential going it alone. It couldn't be done. – William G. Bowen, President, The Andrew W. Mellon Foundation

The Mellon Foundation:

Funding that Made the Five Colleges of Ohio Possible

Well, perhaps “possible” isn't the best word. It was, and is, the *people* who made and make this consortium possible. The funding simply lets them do it.

In February 1994, over the signature of President Philip H. Jordan, Jr., Kenyon College, in partnership with Denison University and The College of Wooster, submitted to the Andrew W. Mellon Foundation a proposal for a planning grant “to enable us to work with these partner institutions to develop a program of significant cooperative undertakings in the sharing of library, information technology, and faculty and curricular resources. Our common goal is to enhance the resources available to our students and faculty and at the same time to realize significant reduction in costs through collaborative sharing of these key resources.”

Mellon responded quickly and positively, providing \$24,000 for the planning process. Early in the investigation of cooperative areas, Ohio Wesleyan University was invited to participate. Library applications stood out as optimal for collaboration, a focus due in part to the proof-of-concept offered by Five Colleges, Inc. (Amherst, Hampshire, Mount Holyoke, Smith, and the University of Massachusetts Amherst) and the Tri-Colleges Consortium (Bryn Mawr, Haverford, and Swarthmore). The libraries in each consortium had been cooperating through a shared automated catalog using software from Innovative Interfaces, Inc., the vendor ultimately selected by OhioLINK and thus the future Ohio Five. Primary library objectives were to (1) investigate means of developing complementary library collections to avoid unnecessary duplicate acquisitions and increase unique titles and (2) develop plans for creating a merged library system to allow access to a shared database of all member library holdings and to OhioLINK.

The other major objective of the planning grant was to study the desirability, feasibility, and effectiveness of creating a new organizational framework or legal entity to run the consortium. The college presidents began serious discussions of these matters, and the positive results were draft articles of incorporation and a membership agreement for the consortium.

Having planned with a little to ask for a lot, on May 4, 1995, a second proposal to Mellon was submitted, requesting a grant “to initiate a consortial effort to provide a cost-saving, resource-building plan involving collaboration among the colleges. The area where collaboration will first take place is the libraries.”

On June 22, Mellon sent a letter of approval and enclosed a check for \$840,000; and by the end of June, the Five Colleges of Ohio was incorporated as a not-for-profit entity, with Michele Myers as the first chair of the Board of Trustees, Joe Nelson as chair of the Operating Committee, and Dave Pilachowski as chair of the Library Committee.

Now did joy abound? Perhaps, but certainly now began the work to do more, do it efficiently, and – because grants require reports – to prove the benefits.

In Short – Did We Meet Our Goals?

Let’s see how the consortium fared in meeting the overall goals of the library project as stated in the proposal:

Goal 1: *To complete a merger of the libraries’ databases,*

Goal 2: *To acquire reference databases for multiple-library sharing,*

Goal 3: *To explore image-sharing among the libraries,*

Goal 4: *To share resources and enrich collections on a significant level, and*

Goal 5: *To save money at least on a moderate level.*

The consortium achieved Goal 1 in mid-July 1996, when Denison, Kenyon, Ohio Wesleyan, and Wooster achieved a single shared online catalog, CONSORT.

In November 1996, the CONSORT libraries used Mellon funds to join OhioLINK. After productive investigation and some conceptual planning, the need to pursue Goals 2 and 3 was happily overcome by the event of OhioLINK’s decision to provide these services, thus freeing up funding for other uses and extending what was to have been a two-year grant period to more than seven years.

Goal 4 correctly implies the ongoing collaborative effort inherent in CONSORT and in the consequent opportunity to buy more *new* books, serials, videos, and other items rather than unnecessarily duplicating each others’ collections.

Savings (Goal 5) have come primarily from running a central library system instead of four separate systems. Included in the shared expenses are ILL software and upgrades, ILL maintenance, the server and its maintenance, telecommunications charges, OhioLINK membership and access fees, and employment of the system manager. Other savings come from joint subscriptions and license agreements. “Moderate” savings to date, based on what it would cost each of the libraries to carry out these endeavors individually, are estimated to total about \$3 million. In addition, substantial cost-avoidance has resulted from the initiatives to coordinate collection development, share teaching of information literacy, establish CONStor, and redesign workflows.

If We Build Ideas Compellingly, Funds Will Come.

Support for consortium activities has included library and non-library activities. Let us now look briefly at some of these major post-founding Ohio Five projects and grants and the beneficial results they have underwritten.

Language Teaching with Technology, 1996 - 2002

In June 1996, just one year after awarding the grant that founded the consortium and CONSORT, the Mellon Foundation approved a \$750,000 grant to foster collaborations among faculty for course design and applications of teaching technology in modern foreign languages. This *Teaching with Technology* project was part of the Mellon Foundation's Liberal Arts Colleges Program. In December 1996, the consortium was awarded \$250,000 by the Charles E. Culpeper Foundation to create language classrooms on each campus equipped with modern instructional technology.

Government Documents, 1998 - 2001

The founding Mellon grant originally allotted \$11,428 for cataloging government documents. With Mellon's acceptance of Damon Hickey's proposal to increase this project by reprogramming \$141,603 from the original database budget, given that the OhioLINK system would provide sufficient database functionality, the library directors authorized the Government Documents Subcommittee to draft a three-year plan for cataloging older (primarily nineteenth-century) government documents held by individual Ohio Five libraries and listing these resources in CONSORT (and thus in OhioLINK) and the OCLC international database. Ellen Conrad, originally at The College of Wooster and now at Denison University as a Catalog Specialist, was quickly hired as coordinator.

The results won the 2000 Bernadine Abbott Hoduski Founder's Award, "presented to the Government Documents Group of the Five Colleges of Ohio, for their project to retrospectively catalog pre-1976 Federal Depository documents. The Hoduski Award recognizes documents librarians who may not be known at the national level but who have made significant contributions to the field of state, international, local, or federal documents. This award recognizes those whose contributions have benefited not only the individual's institution but also the profession."

The citation continues, "The benefits to all depositories of such a critical mass of high-quality bibliographic data has been recognized, studied, and discussed in the literature for many years, and various forerunner projects have paved the way. The Five Colleges of Ohio has harnessed the individual strength of their member collections, the experience and expertise of their librarians, and have boldly stepped forward, with careful consideration and significant commitment, to successfully implement a project that is creating that critical mass."

Information Literacy Tutorial, 1998 - 2001

In December 1998, the consortium received \$50,000 from the Foundation for Independent Higher Education and AT&T to develop information literacy web tutorials to

increase students' understanding of how information is produced, accessed, evaluated, and used.

This 45-page tutorial package, which is available on the web, includes modules on the flow of information; selecting and refining your topic; determining the information you need; finding background information from reference sources, the library catalog, research databases, and the web; and putting everything together by evaluating your information and using citation. The Project Director was Ray English, Director of Libraries, Oberlin College.

Information Literacy in the Liberal Arts Curriculum, 2000 - 2003

On December 23, 1999, the consortium received a three-year, \$475,000 grant from the Andrew W. Mellon Foundation to strengthen the teaching of information literacy in the liberal arts curriculum. Ray English, Oberlin College, served as Project Director and chair of the steering committee. A total of 161 representatives from all five members of the consortium participated in this project.

The grant has broken new ground for faculty and librarians in the Five Colleges consortium, encouraging both groups to take on new roles. It engaged faculty in information literacy issues, involved librarians with faculty in developing courses, and gave other colleges and consortia a model for addressing information literacy.

In terms of its primary goal, integrating information literacy into the liberal arts curriculum, the project had a very significant impact. During three and a half years, the grant funded 80 curriculum development projects, involving 122 faculty, 39 librarians, and 155 courses in 36 disciplines. Eleven of the 80 projects addressed the major course sequence in a comprehensive manner, and 13 more had significant curricular impact on multiple courses in a discipline.

All consortium members have acted to institutionalize the integration of information literacy into their curricula. College of Wooster librarians have been assigned to faculty who teach First-Year Seminars, and many instructors have worked with these librarians to design and implement an information literacy component for their sections. And Wooster's Educational Planning Committee has added information literacy considerations to departmental curriculum reviews.

Denison's library, after working during the grant period with several faculty to administer online information literacy pre-tests and post-tests measuring the effectiveness of instructional efforts, got permission from the Dean of First-Year Students to administer the SAILS (Standardized Assessment for Information Literacy Survey) to half the incoming first-year students for the 2004 - 2005 academic year, and every other year thereafter, which will yield a rich enough sample base to enable valid comparisons. In addition to expanding their efforts with first year seminars, they also plan to focus on departments that did not participate in grant activities.

Kenyon continues to emphasize information literacy programs through targeted faculty programming, particularly with new faculty as they arrive on campus, and by supporting faculty/liaison integration efforts to promote direct access to curricula.

Oberlin has continued to work on its very successful program with first year seminars. It has made funds available to faculty to collaborate with librarians in the development of new first-year seminar courses. Approximately 90% of first-year seminars now have an information literacy component. Oberlin also recently completed SAILS for a group of over 300 first-year students and plans a follow-up assessment. The Library is also continuing to encourage departments to incorporate information literacy into their course sequence, emulating already successful projects.

At Ohio Wesleyan, many of the 24 collaborative projects involving seven librarians and 36 faculty members that started under grant funding have continued. And the library has since offered support to faculty who did not participate in the original grant. Also, information literacy has been infused into a wide variety of courses not formally part of the grant process such as a first-year student honors seminar in zoology, a literature-based research assignment in general chemistry, modules within the physics senior research seminar, and throughout the methods and materials of the geology curriculum. Ohio Wesleyan is participating in a First-Year Information Literacy in the Liberal Arts Assessment with other ACM and GLCA colleges. The results will give librarians insight into the information literacy and research habits of incoming students and provide a benchmark against which to measure growth in information literacy as students move through the academic program.

Collection Development, 2001 - 2004

Perhaps the hardest thing for libraries to cooperate on is collection development. Collaborating in areas of collections for individual libraries requires significant commitment to the larger consortium, and results in having to make difficult choices about the future of local collections. Ideally, on behalf of giving students, faculty, and other users the widest *and* deepest access possible, institutions will get together, analyze the special needs and strengths of each, see what's missing, and decide to aim their acquisitions dollars in the direction of synergy. That way, the whole will indeed violate Euclid's postulate and be greater than the sum of its parts, because the consortium makes the resources available to all.

To this end, the four CONSORT colleges succeeded in attracting a Mellon grant of \$325,000. The funds were awarded through the Great Lakes Colleges Association for the period February 2001 to June 2004 to focus on two major initiatives: the in-depth analysis of the existing collections of the four college libraries, and the establishment of CONStor, a joint library storage facility.

College of Wooster Technical Services Librarian Margo Warner Curl served as coordinator of the grant. Oberlin, while not a direct participant in the grant, is sending materials to CONStor.

Overall, the Cooperative Collection Development grant was a positive experience for the Five Colleges of Ohio. Although implementation was not always as smooth or far-reaching as might have been hoped, specific successes include higher visibility and priority on cooperative collection development; better reporting mechanisms to facilitate cross-campus communication on these issues; a pilot joint approval plan; and the shared storage facility, CONStor.

The consortium has completed its first discipline-based review in Religious Studies, and is working on a second, in Environmental Studies. Future disciplines will be chosen for review year by year. An ongoing process will continually test and, it is hoped, improve the shared approval plan by keeping the idea of cooperative collection development at the forefront of consortial thinking.

Library Work Redesign, 2004 - 2005

Eager as always to support cogent proposals for reinventing library processes, late in 2003 The Mellon Foundation awarded \$100,000 to the team of Denison University and Kenyon College to redesign existing workflows, integrate work processes for the two colleges, and create the team that will carry the work forward at the end of the grant.

An integral part of redesigning the work of the Technical Services departments involves moving to more efficient and cost-effective procedures, thereby freeing staff time for work on other tasks, particularly those requiring intellectual activities. This project, to be completed in December 2005, was designed not only to produce efficiencies of scale but also to ask and — with no assumptions based on how these processes have been managed in the past — answer the fundamental questions of the role of a technical services operation in the 21st century liberal arts college library. The goal of the redesigned work process is the establishment of a combined and reshaped collection management (technical services) department that, by recognizing the changed information-seeking behaviors that networked information has brought, accurately reflects and addresses the needs of patrons in an electronic age. The new system will affect both physical and virtual collections, as well as the access tools in place, or to come, for navigating them.

The directors of the grant included, from Denison, Scottie Cochrane, Director of Libraries; and from Kenyon, Christopher Barth, Director of Information Resources, and Dan Temple, Vice President for Library and Information Services. The coordinator of the task force was Ellen Conrad, Denison University.

Figure 1. Grants Awarded to the Ohio Five.

The graph on the facing page shows grants awarded to the Ohio Five. From March 1994 through June 2005, the consortium received almost \$3.7 million in grants and scholarships, with more than \$1.8 million for library-related projects and programs. And since its inception, the CONSORT library system has saved approximately \$3 million.

Five Colleges of Ohio Grant Summary													
1994 - 2005													
Grant Programs	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Mellon Library Planning	\$24,000												
Mellon Library and Ohio Five Incorporation		\$840,000											
Mellon Language and Technology		\$750,000											
Culpeper Language Equipment		\$250,000											
AT&T Information Literacy						\$49,490							
Mellon Strategic Planning			\$32,000										
Mellon Information Literacy			\$475,000										
Mellon/GLCA Collection Development								\$325,000					
Mellon/NITLE Language									\$10,000				
Storer Foundation Scholarships										\$750,000			
Mellon Library Work Redesign											\$100,000		
OhioEPA Environmental Education												\$50,000	
United Educators Slips, Trips, and Falls												\$2,000	
Teagle Value-Added Assessment													\$25,000

Chapter 4. Major Successes and Accomplishments

The consortium has become the focal point for an ongoing, constructive conversation among people at the five institutions about issues and opportunities of mutual concern.

– Thomas B. Courtice, President,
Ohio Wesleyan University, 1994 - 2004

An Ongoing, Constructive Conversation

When Native American tribes meet to discuss issues and opportunities, they specify the gathering's starting time but not its end. To everyone but hotel reservation agents ("Three hundred people, yes; for how many nights?"), this is perfectly sensible: after all, how can they know in advance when they'll be done, how long it will take for everyone to have a full say and to consider and respond to the thoughts of others?

As a consortium and a corporation, the Five Colleges of Ohio is essentially following that Native American custom. A decade of ongoing, constructive conversation has seen the creation of a basis for trust and understanding, and thus a foundation for programs that will continue to enhance the institutions. The bonding that has taken place has stimulated all to challenge the status quo, to think about how to be better both collectively and individually. And with changes in personnel – especially with new presidents, chief financial and academic officers, and library directors – the "chemistry" shifts, bringing fresh insights and experiences to the table.

The Ohio Five gives the Presidents a forum to initiate public dialogue – with the Ohio Board of Regents and its Chancellor; with the Governor, State Senators, with media representatives including the boards of the *Columbus Dispatch* and the *Cleveland Plain Dealer* – about consortial innovations and the value of a liberal arts education.

Although the consortium was formed with the presidents and chief financial officers as the primary leadership and governance groups, the role of the chief academic officers has not been ignored. The deans, provost, and academic vice presidents have met frequently to coordinate library and academic technology projects. They are currently involved in the development of academic uses for videoconferencing, which have included faculty seminars in specialized fields and shared courses in lesser-taught languages.

The establishment of the consortium has prompted a wide variety of other college representatives to meet. Contact with peers has become a means of professional development, allowing joint problem-solving and informal support. In addition to those mentioned previously, groups that have met include career services directors,

computing and information services directors, conference directors, controllers, development officers, environmental health and safety managers, faculty members, grant officers, human resources directors, off-campus studies directors, presidential assistants, public relations directors, purchasing managers, security directors, and telecommunications administrators.

CONSORT: The Essential and Sustaining Spark

Asked about the likelihood of a consortium involving Sarah Lawrence College, her current institution, Michele Myers told us “No. It just doesn’t seem to work here. There was no *project* to spark collaboration.” Creating the CONSORT Library was surely the *project* for the Ohio Five. Not only did it establish the sharing of resources, joint OhioLINK membership, increases in services, and reduced management costs; the shared catalog also served as a seed crystal for further collaboration, both within the libraries and beyond.

The CONSORT system, formed in 1996 as an “endeavor” of the Five Colleges of Ohio Consortium, Inc., was the first multi-library system within OhioLINK and the first-ever group of libraries to merge their separate Innovative Interfaces Inc. library systems into a single system with a single catalog.

CONSORT’s express purpose was to reallocate resources that had been used to support four separate systems into enhancing individual institutions’ collections and services. Although Innovative was at first hesitant about providing consortial licenses, CONSORT is now one among a great many others, including the Ohio Private Academic Libraries (OPAL) consortium of 23 small institutions, for which ILL has developed Agency Software to facilitate these sorts of mergers within larger systems such as OhioLINK.

Oberlin chose not to participate in the combined system. “Just before the CONSORT system was proposed,” Ray English said, “Oberlin had bought a new Innovative Interfaces integrated library system and had also committed to join OhioLINK independently. Software available for the CONSORT system didn’t then have the capacity to evenly distribute requests among borrowing libraries. Since Oberlin’s library collections were substantially larger than those of the other four, it would have been impossible to control the high levels of requests that would inevitably have come to Oberlin as a CONSORT participant. Oberlin was also concerned about a variety of technical issues related to the proposed shared database (including authority control and the potential loss of specialized cataloging information that had been entered into its catalog over many years) as well as the significant amount of staff time that would be involved in both starting up and maintaining the shared catalog. Finally, the time devoted to traveling to meetings would have been considerable, given Oberlin’s geographic distance from the other campuses.”

Even though Innovative chose to add a per-library charge for each additional library in the shared system, CONSORT has saved significant money on hardware, software, maintenance, and staffing. Centralizing system support has been a plus, not a minus.

Equally important, working with a single catalog (first grant) has led to finding more ways of cooperating and sharing resources (and receiving grants!), including cooperative collection development, shared cataloging of government information and serials, retrospective cataloging of historical government documents, joint technical services work-flow redesign for Denison and Kenyon, joint leasing of off-site storage for lesser-used materials, improved authority-control, extended consortial borrowing periods for faculty members, sharing books for course reserves, working together on emergency preparedness, and making joint database purchases. Joint negotiations have resulted in increased leverage with vendors and thus savings to the institutions for long-distance telephone service, insurance, library software, and electronic subscriptions.

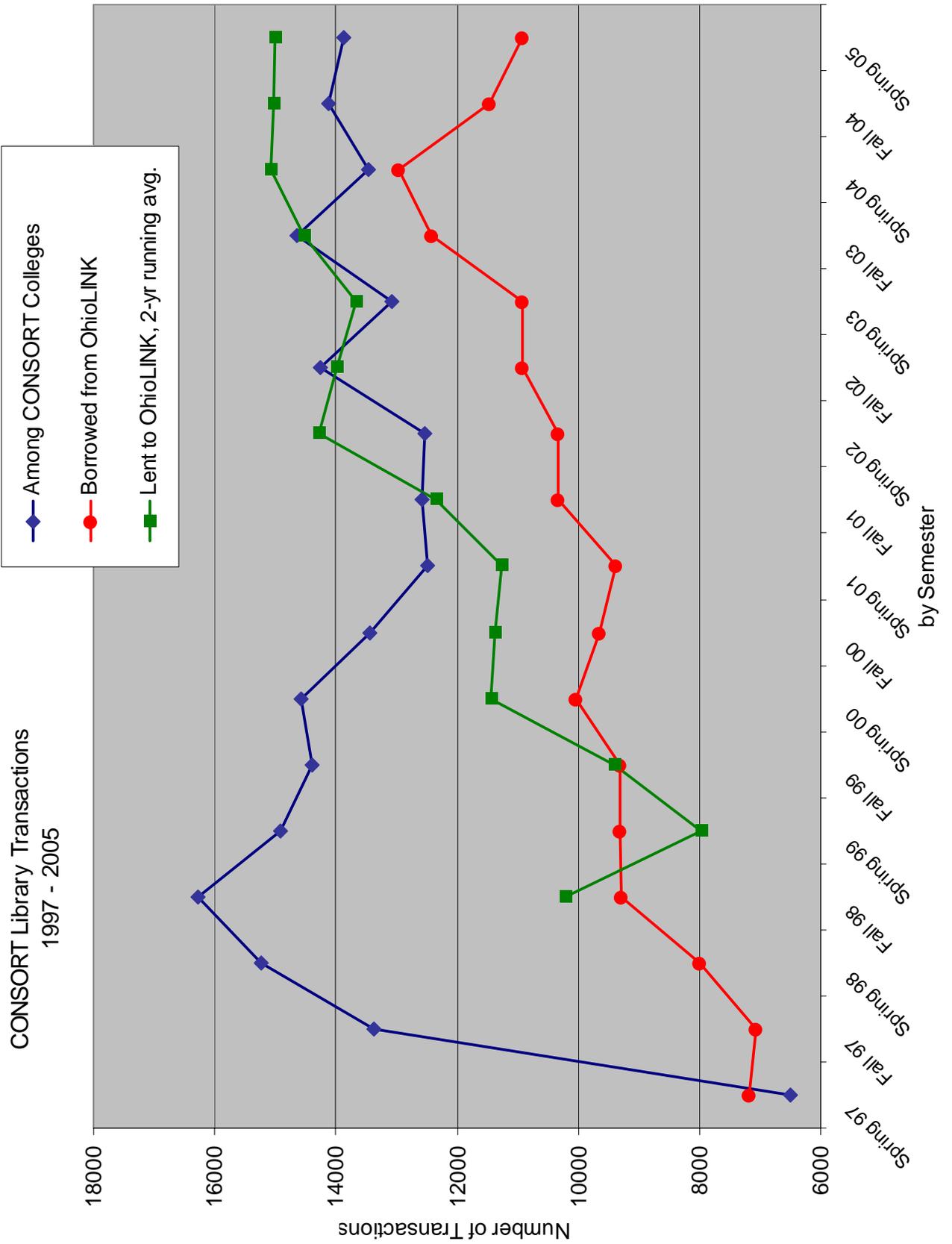
These combined efforts have not detracted from individual collections or services. To the contrary, they have allowed the consortium to buy more and do more. In 1996, the combined CONSORT collection totaled about 1.2 million volumes. Today it's about 2.2 million, with about 1.2 million of those being unique. Access to OhioLINK originally meant 17.2 million volumes from 50 libraries; now it's almost 27 million volumes from more than 85 libraries. And the number of available electronic journals has shot from 175 to more than 10,000.

And the consortium not only bought more and did more, it did more sooner. Michael Upfold, Library Systems Manager since 1998, told us, "Sharing costs among our four libraries let us to purchase more software, more quickly than any one of the libraries would have been able to do. For instance, CONSORT purchased the Innovative Interfaces Millennium software several years ago, while many other libraries have yet to upgrade. The cost of ERes (a program that provides electronic access to materials placed on course reserve) and a number of other software modules have been shared, allowing us to purchase them consortially when none of the individual colleges could have justified the cost. There have also been occasions when one library had a plan for using a particular module (e.g. for scheduling the use of videos) and another library was able to use the same program for a different function (e.g., for scheduling the use of equipment) without incurring any additional cost." So, cooperative efforts have not only saved money but enabled the Ohio Five library systems and services to remain up-to-date or even ahead of those at peer institutions.

The only cost has been the staff time to work out consortial arrangements. Directors currently hold conference calls monthly and overnight mini-retreats quarterly. Five standing subcommittees and a task force, chaired by directors and the CONSORT systems manager, meet regularly as well. But some consortial arrangements also save time. Clearly, the net result has been a broader perspective and a sense of collegiality across institutional boundaries. And although each institution has lost exclusive control over the library catalog the gains far outweigh any small sacrifices. The example of CONSORT strongly suggests that libraries with independent systems should consider the advantages of merging.

Figure 2. CONSORT Transactions by Semester

The graph on the facing page shows CONSORT transactions by semester. Borrowing among CONSORT colleges took off like mad and has never really fallen off. And CONSORT has from the start been a net lender to OhioLINK.



A Good Harvest: From a Portable Tree, the Fruit Can Fall Anywhere.

In the July 1995 press release announcing the first Mellon grant, Bill Bowen said, “The foundation will follow the consortium’s progress with interest to determine how other groups of colleges might benefit from their experience.”

We learned that one early transfer of the CONSORT model occurred as the result of a conversation that took place at an Oberlin Group meeting between the Ohio Five library directors and a group of Oregon library directors. The State of Oregon adopted a shared system for Willamette University and Reed College that blossomed into the ORBIS system, which Dave said was “OhioLINK like; and so the liberal arts college directors looked to the Ohio Five for information on what they might expect.” Washington State had its own system, which then merged with Oregon’s as the ORBIS CASCADE Alliance of 31 institutions.

After moving to Williams College in 1999, Dave missed having other directors to work with. Because of his experience with the Ohio Five, Dave worked for two or three years to get Williams into the Boston Consortium of 19 institutions, which finally happened in 2002. The BC is more like OhioLINK than like the Ohio Five; Wellesley is its only other liberal arts college.

Once he arrived at Vanderbilt University in 1996, Paul Gherman began working with the director of the Vanderbilt public library, resulting in the 1997 establishment of the Nashville Area Library Alliance, a group of 19 academic and school libraries, as well as the Nashville Public Library and the Tennessee State Library and Archives. Then, in 1998, came IRIS, a consortium of Vanderbilt, The University of Kentucky, and The University of Tennessee, based at Vanderbilt. IRIS uses software that allows multiple catalogs to search each other.

In January 2001, with Paul as Board President, the Association of Southeastern Research Libraries, a consortium since the 50s, launched “Kudzu” (“It covers the South,” and subsumes IRIS), a system of linked online catalogs at 17 participating research libraries across the Southeast. Kudzu connects approximately 300,000 students and faculty to more than 30 million volumes. The system allows users to browse the participating catalogs using a single search interface and to submit interlibrary loan requests directly to the source library. Most documents can be delivered to the user within a few days.

Not all directors have found or been able to establish consortia. Kathy List, who left Ohio Wesleyan in 1997 for the Ringling School of Arts and Design in Sarasota, Florida, misses the Ohio Five consortium. She especially valued the “collegiality, the tremendous trust and integrity, the amazing depth and array of resources available to faculty and staff, the sense of planned progress with timelines and budgets: in short, working for the whole.” Unfortunately, in Sarasota, there just aren’t similar institutions with which she might collaborate to bring in a good harvest.

Frank Wojcik, at SUNY Brockport since 2002, reports that his institution “is part of the SUNYConnect consortium that includes all SUNY campuses. SUNYConnect is currently implementing a system-wide library management system, and its goals include doing the kinds of resource sharing we accomplished in Ohio Five and OhioLINK. The consortium is very large, and it is managed by SUNY’s Office of Library and Information Systems (OLIS), which is based at SUNY Central Administration in Albany. Compared to my experiences in Ohio Five, OLIS is remote. I miss the immediate and intimate involvement with consortial planning and decision making that I enjoyed in Ohio Five.”

Why Did It Work?

“Why did it work in Ohio?,” Phil Jordan asked, then answered his own question. Phil found Ohio a place “where collaboration could be done, because, in the Midwest there wasn’t such a focus on the pecking order.” And because there was trust among the presidents, “an inheritance from previous relationships.”

Belonging to the GLCA and the athletic conference, Phil said, “had created friendships among the presidents and prepared them for mutual support.” Among these friends was the College of Wooster’s Henry Copeland, who told us that he “came into the conversation about twelve years ago.” He and Phil Jordan, he said, had had a hand in forming the North Coast Athletic Conference (NCAC), and both were members of GLCA, so they met often, formally and informally. Michele Myers agrees: “We were also involved in sports, through which the presidents got to know each other very, very well.” And, she said, “The conversations became easier” as relationships developed among IT people, deans, different groups at different levels. It was easy to work with these five colleges.”

Oberlin’s Nancy Dye noted that the presidents and CFOs got to know each other well, as they sort of had to, given the corporation structure. Nancy said the CFOs came to be a kind of “mutual aid society.” Among these top people there was a “high sense of trust.” Normally, as a president, “you can’t let your hair down in a consortium of like institutions because of competition. Whereas deans, of which she’d been one, always ask each other for help, presidents don’t as easily talk about what’s on their minds because “they constantly wear the mantle of the institution.” But in this consortium, “trust and sharing prevailed and prevail, even as founders have left and others have taken their places.”

When we asked what she thought the secret was, Nancy said, “It’s first because the job of president at the five colleges is very similar. Each president was successful, and all shared some personality traits and interests that predisposed them to establish a close relationship.”

Chapter 5. Envisioning the Future

In combining our talents and resources we find we will be able to strengthen and broaden our common ground, while freeing resources for those areas where we are each unique.

– Robert A. Oden, Jr., President,
Kenyon College, 1995 - 2002

President Oden's words, placed strategically near the end of his September 26, 1996, letter transmitting the first interim report to the Mellon Foundation, not only express appropriate confidence in the rightness and efficacy of a new joint mission but also crisply capture the essential standards by which the consortium's future may be judged.

Philosophical Statement of the Libraries

Looking ahead to new challenges and opportunities, this celebration of the Libraries of the Five Colleges of Ohio's first decade is concluded with a portion of the statement crafted by the library directors that expresses the values and actions that will best serve the libraries and, especially, the libraries' patrons in the future:

Mission

Our mission is to serve the academic interests and programs of the five colleges better together than separately, and at lower cost.

The Libraries of the Five Colleges of Ohio, Inc. are dedicated to serving the academic missions of the Colleges. As residential liberal arts institutions, all were founded to offer students a comprehensive education, including the development of skills in active, independent learning and critical thinking. In this context, the Libraries, individually and collectively, strive to promote the intellectual life of the colleges by supporting the exemplary scholarship of students and faculty and by providing the crucial resources that make learning and teaching possible.

By forming a consortium, we have committed ourselves to the philosophy that together we can accomplish more than we could alone. Working collaboratively, we are setting the standard for the college communities, communicating by our actions that our goals are to offer high quality programs, resources, and services, and that we will do so efficiently, maximizing cost-savings.

Vision

Our vision is one of students, faculty, administrators, and staff free from the constraints that insufficient resources might otherwise impose as obstacles to life-long growth and learning.

Looking to the future, we see the library remaining central to the educational process of the liberal arts college. The library will continue to provide and improve the services, information resources, physical space, and staff to support the educational mission of the college. In order to accomplish this, it is crucial that we actively respond to change and that we employ every advantage of our consortial partnerships.

Expectations

Expectations -- literally, what we see when we look out from where we are now -- imply what we must do to create the conditions that will make our vision not merely possible but inevitable.

Broadly, we recognize the growing dependence of the individual libraries on the others in the consortium and the strength gained from our cooperative relationships. Similarly, we acknowledge that the elements that make up a library are interconnected; each aspect may be described separately but must also be considered in the light of the others. Nonetheless, it is by reflecting on the discrete elements of a library that we have come to understand and thus express our expectations.

An Exciting Time to Be a Librarian: What's Next?

When Mary Patterson McPherson came to the Mellon Foundation in 1997 after 19 years as President of Bryn Mawr College, the Five Colleges of Ohio grant was already underway, piloted by Tish and Liz. Pat's "particular interest in collaboration and cooperation was born of her experience of the relationship among Bryn Mawr, Haverford, and Swarthmore. Here were three institutions that couldn't have been more similar, and that had a sense among them that they were the right size and therefore couldn't, and didn't want, to do a 'big' thing on their own. These institutions simply had to figure out how to do things together in order to expand opportunities for students and faculty."

So Pat was more than ready to work with the Ohio Five. And now, in response to Susan Palmer's question of what's next for consortia, she said, "In the next ten years, there will be collaboration on academic fronts that would be hard for people to imagine would work."

"In language instruction, we need much more imaginative collaborations outside the academic year -- summer internships, study abroad -- to give students the linguistic skills they need." On the library front, which is still largely a "belts and suspenders operation," where "we do everything three times over," the question is what *shouldn't* they be doing so they can do what they *should* be doing," e.g., doing more along the lines of the Ohio Five's "genius with literacy, putting together the library and faculty *by discipline*: a social science librarian with the social science faculty, a science librarian with science faculty, and so on." Finally, she said, "we're trying to help libraries be imaginative about their physical space, in terms of, for example, media clusters." In short, Pat sees this as "an exciting time to be a librarian. It's not as it was when you just did the same thing for fifty years."

Joe Fleming also spoke to us about what's next in technology: "Videoconferencing that goes way beyond what we have now. Network bandwidth is going to become very cheap. We'll be able to have holographic meetings. OARNET [the Internet Service Provider used by the Ohio Five] is already in its 'third frontier,' with transmission rates of gigabytes per second."

Joe's bottom line was that "the future will be human-limited rather than technology limited. We'll be able to send more information per unit time than humans can (so far) process." Won't *that* be a fine problem to solve!

Imagining the Unimaginable

Over the past decade the Ohio Five libraries achieved what individual liberal arts college libraries elsewhere have only dreamed of doing. Damon Hickey, Director of Libraries at the College of Wooster, put it this way, "We have increased access to library materials in one another's collections, freed space for newer materials by reducing duplication of older ones, and controlled collection growth by reducing duplication of new purchases. In addition, we leased an offsite storage facility to ease pressure on campus libraries and to make library space available for more innovative uses, enhanced library instruction and information literacy on all campuses, made rich collections of historical government documents accessible for the first time, and saved money by buying and maintaining a shared automated catalog. Because of our close relationship we were able to inaugurate interlibrary lending of reserve and audiovisual materials in addition to regular circulating books and extend loan periods to faculty and students of one another's institutions."

Ten years ago, few people, except perhaps the founding library directors, would have predicted all of these accomplishments. What unimaginable goals are the directors imagining now?

The expectations for CONSORT – expectations the member libraries have placed upon themselves – will guide consortial thinking and striving in the decade to come. The Five Colleges librarians see themselves as campus leaders in harnessing scholarly intellectual resources in all formats, providing access to those resources, and preserving them. The libraries have consistently been champions of user instruction and early adopters of new technology and efficiencies.

For the foreseeable future, the Ohio Five library consortium will be attending to issues of balance, roles, and relationships: What is the balance between storing and weeding older, lesser used materials? What is the role of the liberal-arts college library in the context of the electronic 21st century? What are the needs of faculty and students? How do we use library space to best advantage? What is the balance between saving money and expanding resources? What is the relationship of CONSORT to OhioLINK and other regional and national library associations and initiatives?

As these topics are deliberated, the Five Colleges' library directors remain committed to work together and with the wider library community to maximize archived collections

and provide expanded delivery by courier and electronic means, continue coordination of acquisitions to optimize the depth and breadth of the collections, and improve connectivity of systems so that users can efficiently and effectively find the most relevant sources of information.

Looking Ahead: Can the Ohio Five Do That?

By 2005, four of the founding presidents had retired or moved into new positions, providing the consortium with a new mix of leaders. Continuity comes from the presence of Nancy Dye, a founder who continues as president of Oberlin College, and R. Stanton Hales, representing the College of Wooster. Stan, vice president of academic affairs at Wooster from 1990 to 1995, became president in August 1995, just over a month after the signing of the Five Colleges of Ohio papers of incorporation. With the arrival of Dale T. Knobel at Denison University in 1998, S. Georgia Nugent at Kenyon College in 2003, and Mark W. Huddleston at Ohio Wesleyan University in 2004, the Ohio Five board is well positioned for future “ongoing, constructive conversations.”

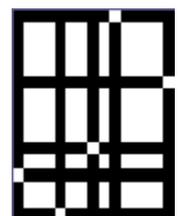
When asked to reflect on the value of the consortium and areas of future activity, the 2005 board members echoed themes of camaraderie, efficiency, innovation, mission, and proximity. The camaraderie and trust among the presidents identified by Nancy Dye (Chapter 2) as hallmarks of success were quickly apparent to Mark, the newest board member. At his first board meeting in the fall of 2004, he observed that the Ohio Five was a place to “learn the ropes” with a small cohort of trusted peers.

Georgia, who described the initial sharing of library resources as “a brilliant idea,” went on to say that focusing on what makes the consortium distinctive might be the key to the future. She suggested that our successful approach to libraries and technology be used to “create cultures on our campuses where truly innovative pedagogical work with technology is meaningfully rewarded.”

In Dale’s estimation, the colleges have benefitted tremendously from the library consortium, both in terms of “thinking about library services in new ways and, in practical terms, saving us from the extraordinary expenses of more physical expansion.” He sees the consortium as providing uncommon “opportunities and advantages” due to the colleges’ geographical proximity and involvement in a “shared educational enterprise.” Moreover, he predicts future growth in programs for staff, based on recent successes in environmental health and science and safety and risk management. When asked if he was glad that Denison was a member of the Ohio Five, his answer was, “You bet!”

With such enthusiastic leadership, there is no reason to doubt that the Ohio Five will continue to “do more and do better for less.” And as Stan explained in an address given in 2001 to the Association for Consortial Leadership, national organization that provides a forum for higher education professionals involved in cooperative programs, it will be doing “more and better with friends.”

The collegial foundation of the consortium has served it well, allowing it to grow into a flexible, dynamic organization whose power lies in its potential to help the colleges accomplish their educational missions. Joe Nelson once observed that the impact of the consortium can be seen in meetings across campus. He said, “More and more, you hear the comment, ‘I wonder if the Ohio Five can do that.’”



Appendix

The Five Colleges of Ohio 1995 Leadership Roster

Board Members: College Presidents

College of Wooster.	Henry J. Copeland
Denison University.	Michele T. Myers
Kenyon College.....	Philip H. Jordan, Jr.
Oberlin College.	Nancy Schrom Dye
Ohio Wesleyan University.....	Thomas B. Courtice

Operating Committee: Chief Business and Finance Officers

College of Wooster.	William H. Snoddy
Denison University.	John C. Burditt
Kenyon College.....	Joseph G. Nelson
Oberlin College.	Samuel C. Carrier
Ohio Wesleyan University.....	Louis Szalontai

Library Committee: Directors of the Libraries

College of Wooster.	Damon D. Hickey
Denison University.	Dave M. Pilachowski
Kenyon College.....	Paul M. Gherman
Oberlin College.	Raymond A. English
Ohio Wesleyan University.....	Kathleen L. List
Five Colleges of Ohio System Manager.....	Frank Wojcik

Library Subcommittees

Ex-Officio Member of all Subcommittees..... Frank Wojcik, System Manager

Acquisitions Subcommittee: Millie Charron, Acquisition Supervisor, Denison. Earl Griffith, Head of Collection Development, Denison. Donna Heady, Chair, Acquisitions/Serials Librarian, Kenyon. Prue Holtman, Acquisitions Manager, Wooster. John Sluk, Head of Monographs, Oberlin Library. Director Liaison: Paul Gherman, Kenyon .

Cataloging/Systems Subcommittee: Gil Chang, Co-Chair, Deputy Director of Libraries, Denison. Margo Warner Curl, Technical Services Librarian, Wooster. Judy Orahoad, Chief of Cataloging, Ohio Wesleyan. John Sluk, Head of Monographs, Oberlin. Donna Wilson, Co-Chair, Head of Technical Services, Kenyon. Sha Li Zhang, Head of Technical Services, Ohio Wesleyan. Director Liaison: David M. Pilachowski, Denison.

A/V Media Subcommittee: Tony Bordac, Wooster. Chuck Delia Lana, Manager of Audio Visual Services, Ohio Wesleyan. Patricia McVay Gorrell, Chair, Manager of Film and Video Services-Audio Visual Services, Wooster. Ron Howard, Media Specialist, Learning Resources Center, Denison. Susan Kempton, Audio Visual Department,

Kenyon. Carmen King, Fine Arts Librarian, Kenyon. Karen Morrison, Office Coordinator, Learning Resources Center, Denison. David Mulford, Assistant Director of Media Technology, Kenyon. Dennis Read, Director of Learning Resources Center. Frederick Zwegat, Director Audiovisual Services, Oberlin. Director Liaison: Damon Hickey, Wooster

Circulation/III Subcommittee: Kathy Connor, Circulation Supervisor, Wooster. Bernard Derr, Chief of Circulation, Ohio Wesleyan. Alison Gould, Head of Circulation, Oberlin. Tom Green, Associate Director of Libraries, Ohio Wesleyan. Beverly Herring, Circulation Supervisor, Denison. Jami Peelle, Special Collections Librarian, Kenyon. Joan Pomajevich, Circulation Head, Kenyon. Carolyn Rahnema, Assistant Circulation Supervisor, Wooster. Cindy Wallace, Interlibrary Loan Manager, Kenyon. Director Liaison and Chair: Kathleen List, Ohio Wesleyan.

Database Server Subcommittee: Alan Boyd, Chair, Associate Director of Libraries, Oberlin. Gil Chang, Deputy Director of Libraries, Denison. Tom Green, Associate Director of Libraries, Ohio Wesleyan. Julia Gustafson, Reference Librarian, Wooster. Joann Hutchinson, Electronic Resources and Reference Librarian, Denison. Alison Ricker, Science Librarian, Oberlin. Jennifer Ross, Reference Librarian, Kenyon. Director Liaison: Ray English, Oberlin.

Government Documents Subcommittee: Jane Horn, Serials and Government Documents Manager, Ohio Wesleyan. Megan Mitchell, Reference Librarian, Oberlin. Andrea Peakovic, Government Documents, Kenyon. Margaret Powell, Chair, Government Documents/Reference Librarian, Wooster. Mary Webb Prophet, Head of Reference, Denison. Director Liaison: Damon Hickey, Wooster.

Network & Telecommunications Subcommittee

College of Wooster.....	William Snoddy, Vince Discipio, Clint Hoffstetter
Denison University.....	Mike Frazier, Terri Beamer
Kenyon College.....	Ron Griggs, Betsy Fox
Oberlin College.....	Gary Koepp
Ohio Wesleyan University.....	Sue Cooperrider, Harold Wiebe

The Five Colleges of Ohio 1995 - 2005 Leadership Roster

Board Members: College Presidents

College of Wooster.	R. Stanton Hales
Denison University.	Dale T. Knobel
Kenyon College.....	<i>Robert A. Oden</i> , S. Georgia Nugent
Oberlin College.	Nancy Schrom Dye
Ohio Wesleyan University.....	Mark W. Huddleston

Operating Committee: Chief Business and Finance Officers

College of Wooster.	Robert A. Walton
Denison University.	Seth H. Patton
Kenyon College.....	<i>Joseph G. Nelson</i> , David E. McConnell
Oberlin College.	<i>Andrew B. Evans</i> , Ronald R. Watts
Ohio Wesleyan University.....	George J. Elsbeck

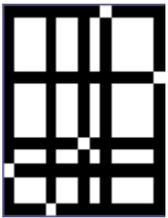
Library Committee: Directors of the Libraries

College of Wooster.	Damon D. Hickey
Denison University.	Lynn Scott Cochrane
Kenyon College.....	<i>Frank Wojcik, Janet Cottrell</i> , Christopher D. Barth, Megan E. Fitch
Oberlin College.	Raymond A. English
Ohio Wesleyan University.....	Theresa S. Byrd

Five Colleges of Ohio Staff Members

CONSORT Systems Manager.	Michael J. Upfold
Executive Office Manager.....	Brenda C. Howard
Executive Director.	Susan Palmer

Italics indicate representatives who served prior to 2005 but are no longer affiliated with Five Colleges of Ohio committees.



College of Wooster □ Denison University □ Kenyon College □ Oberlin College □ Ohio Wesleyan University