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## Narrative Report

### Introduction

The Tampa Bay Library Consortium (TBLC) was founded in 1979 to enable libraries in west central Florida to share resources. TBLC was the first multitype cooperative in Florida and is currently the largest. TBLC's membership includes 95 libraries -- 6 community colleges, 3 State University System libraries, 25 private academic colleges and universities, 4 public school systems, 41 public, and 16 special libraries. Included in the public library member group are two countywide and one multi-county library cooperatives.

Through membership in TBLC, libraries in twelve counties serving over 3.8 million Floridians (approximately 30% of Florida's total population) have succeeded in creating a strong library automation infrastructure. The counties served by TBLC member libraries are Citrus, DeSoto, Hardee, Hernando, Highlands, Hillsborough, Manatee, Okeechobee, Pasco, Pinellas, Polk and Sarasota.

It is TBLC's mission to lead and encourage collaboration, resource sharing, staff development, and innovations to insure that the people of west central Florida receive excellent, up-to-date library services and have access to the world of information. TBLC member libraries pay dues and participate in the governance of the consortium through a Board of Directors and various standing committees.

TBLC automation related projects have included retrospective conversion—creation of standard bibliographic and holdings records, implementation and maintenance of a shared integrated library automation system, and successful demonstration of the feasibility of library Internet access in Florida.

Programs and services are planned based upon input from member libraries. Services, which enable all libraries to provide information regarding their collections of books, magazines and journals, and various other research resources, are central to the support services provided by TBLC.

This project addresses needs set forth in Strategic Direction I and Strategic Direction V in *Strategic Directions for the 21<sup>st</sup> Century, Strategic Plan 2000-2002*. This plan was written in 1999 by a planning team of representatives from TBLC member libraries. The Board of Directors adopted it in September 1999.

Strategic Direction I states that TBLC will **“Lead Members in Creating a Virtual Library and Establishing Access to the Region's Resources.”** Major strategies include development of a regional virtual library and negotiation of wider access to electronic resources through group purchase contracts.

Strategic Direction V states that TBLC will **“Organize and Help Implement the Marketing and Advocacy Efforts for the Tampa Bay Area Libraries.”** Major strategies include provision of coordinated leadership in marketing libraries and in publicizing the services TBLC helps them provide to users.

This project also builds upon support for commitments of the State Library of Florida as expressed in *Access For All: Libraries in Florida's Future – A plan for the continued development of Florida's libraries* (State Library of Florida, 1997). Goal I of this plan is: **All of the people of Florida have equitable access to the world of information through libraries.**

This project is built upon the library technology infrastructure already in place in the Tampa Bay Library Consortium's service area to create a common electronic gateway to member library services. It provides access **from anywhere at anytime** via the World Wide Web. While many TBLC libraries provide access to their own catalogs via the web or dial-in, prior to implementation of this prototype pilot, they did not share a common search tool (interface).

Libraries in the region are customers of at least five different automation vendors-- *epixtech*, Innovative Interfaces, Gaylord, and DRA. Searching on each system is different. The regional *virtual catalog* envisioned by this pilot provides one common search tool (interface) and enables users to search multiple libraries' in a single search. The virtual catalog has become known as **The Anywhere-Anytime Library (Alleycat).**

The *virtual library* seamlessly verifies eligibility for interlibrary loan. It is designed to expand capability to verify eligibility to access commercial information resources such as magazine indexes and full text articles and to provide access to databases created locally such as scanned photograph collections. In the second year activities have been centered upon adding additional libraries and providing connectivity to OCLC as "library of last resort". The software that is available for verification of user eligibility (remote patron authentication for database access) was implemented and is being tested by the Tampa -Hillsborough County Public Library System. Some Alleycat participating libraries will be added to the Tampa test toward the beginning of Year Three. An active Electronic Resources Task Force has continued to work with Beth Watson, Assistant Director to review resources and have continued to purchase e-books for the TBLC member libraries "E-Books for Libraries" project which provides on-line access to full image books. Beth Watson has also facilitated electronic database purchases for member libraries.

Today residents of four counties and students at three private academic institutions in a fifth county are able to use the virtual catalog from anywhere at anytime to both search catalogs and request materials to be sent to their local library outlet. Visitors can also access and search the virtual catalog. This project has been designed to build from a few libraries to a large portion of TBLC's membership. Interoperability with other such systems in the state is a future goal. The software is modular and flexible relative to the features each member library has implement.

## **Project Status**

### ***Virtual Catalog and Interlibrary Loan Management***

This project builds upon the first year pilot project for the Anywhere-Anytime Library. The pilot was implemented in 1999-2000 and has been designated as an Exemplary LSTA Project by the State Library of Florida. The Anywhere-Anytime Library is designed to create a common electronic gateway to member library services. Using the gateway residents have **access from anywhere at anytime** via the World Wide Web to a virtual catalog representing materials in 23 TBLC member libraries. This gateway allows libraries with completely different automation systems to share library holdings and perform interlibrary loan operations as if they were one

common system. Patrons have access to a *virtual catalog*, which provides unmediated interlibrary resource sharing capability. The URL for the project is <http://alleycat.tbtc.org>.

In the first year of the project, 23 libraries from the TBLC membership agreed to participate in this prototype pilot project.

The initial group of libraries was:

- |                                                      |                                                          |
|------------------------------------------------------|----------------------------------------------------------|
| Clearwater Christian College Library (S)             | Pasco County Library (P)                                 |
| Burton Memorial Library (H)                          | Pinellas Park Public Library                             |
| Dunedin Public Library (S)                           | Safety Harbor Public Library (S)                         |
| Eastlake Community Library (a branch of Palm Harbor) | Sarasota County Libraries                                |
| Florida Southern College Library (S)                 | SE College Library(S)                                    |
| Gulf Beaches Public Library (SPIN)                   | Seminole Library (S)                                     |
| Gulfport Public Library (SPIN)                       | St. Pete Beach (SPIN)                                    |
| Largo Public Library (S)                             | St. Petersburg Public Library (SPIN Host)                |
| New Port Richey Public Library (S)                   | Tampa-Hillsborough County Public Library System (H Host) |
| Oldsmar Public Library (S)                           | Tarpon Springs Public Library (S)                        |
| Palm Harbor Library                                  | Temple Terrace Public Library (H)                        |
|                                                      | Zephyrhills Public Library (P)                           |
|                                                      | (S) SUNLINE Library Management System                    |
| (H) Hillsborough Public Library Cooperative          | (SPIN) South Pinellas Information Network                |
| (P) Pasco Public Library Cooperative                 |                                                          |

The sites added in 2000-2001 represent 18 libraries, 5 separate library automation systems, three vendor products, and they provide 27 library outlets. This brings the total population served to over 3.1 million residents who are able to initiate interlibrary loan requests in Alleycat. There are over 5.8 million items represented in the virtual catalog.

<b>DRA Classic</b>	<b>Horizon by epixtech</b>	<b>Polaris by Gaylord</b>
South Pinellas InterLibrary Network	Polk Public Library	Clearwater Public Library
Pasco County Public Library	Cooperative	
Citrus County Public Library		

100% of the users of the **Anywhere - Anytime Virtual Library (Alleycat)** find the project an invaluable library service. They are able to perform a search in their home library’s catalog and all of the other participating libraries by entering the search once. A title list of results is returned. This list is de-duped based on ISBN. The patron can then select to request a title or to see additional information. Additional information includes bibliographic information and availability. People can enter their library card number at a participating library to be “authenticated” for interlibrary loan or they can use the service as a visitor. Authenticated patrons can request items to be delivered to their library of choice. These patron requests become part of what is called “unmediated interlibrary loan.” The user can locate needed items in participating libraries, see if they are theoretically available for checkout, and place holds on those items immediately. By enabling this direct, unmediated service, materials can move cost efficiently and quickly from owning library to borrowers library.

Regional reciprocal borrowing arrangements and statewide ground delivery are additional infrastructure -- already in place, which support this improved, rapid, cost effective library resource sharing. Clients in Hillsborough, Pinellas, Sarasota, Citrus and Pasco counties can go directly to an owning library in any of the five counties and borrow materials. The ground delivery service enables libraries to loan and return materials to remote locations by providing transfer of materials at a set cost for the year. The cost is not affected by a sudden increase in the number of items sent.

The project has demonstrated that residents can:

- Access the virtual catalog from anywhere that has an Internet connection
- Access the virtual catalog 24/7
- Search a virtual regional database of materials by subject, author, title or ISBN
- Display a list of holdings in all of the libraries in a group regardless of the local automated system vendor
- Display the status of the material at that moment in all holding libraries
- Initiate requests for material to be sent to them at a convenient library without need for an intermediary
- Confidently expect that the material will arrive for their use in less than 72 hours
- Plan to pick up the item or to use it at the owning library in the time it takes to drive there

For libraries the project provides:

- An efficient, paperless, means of tracking interlibrary loans
- Software to manage interlibrary loan operations
- A virtual staff member who interfaces with the library's automation system to perform such tasks as holds placement, check out, check in and patron notification
- A vehicle for consortial acquisition of electronic resources at discounted or collaborative prices

### ***LibrarE***

The access to databases and full text materials portion of the project has experienced enormous success in the form of the e-book project. This project, called *LibrarE*, brings a group of TBLC member libraries together to share a growing collection of electronic books purchased from netLibrary. The group includes public, private academic and community college libraries that have collaboratively selected the materials in the *LibrarE* collection. A total of 35 libraries participate. Those libraries are:

Bruton Memorial Library	Palm Harbor Library
Citrus County Library System	Pasco County Library System
Clearwater Public Library System	Pasco-Hernando Community College
DeSoto County Public Library	Pinellas Park Public Library
Dunedin Public Library	Polk Community College
East Lake Community Library	Safety Harbor Public Library
Eckerd College	Sarasota County Library System
Florida Metropolitan University	Schiller International University
Florida Southern College	Seminole Community Library
Hardee County Public Library	Southeastern College of the Assemblies of God
Hernando County Library System	St. Pete Beach Public Library
Highlands County Public Library	St. Petersburg College
Hillsborough Community College	St. Petersburg Public Library
Largo Library	Stetson University, College of Law
Manatee Community College	Tampa-Hillsborough County Public Library System
New Port Richey Public Library	Tarpon Springs Public Library
Okeechobee County Public Library	Temple Terrace Library
Oldsmar Public Library	

At year's end the collection totaled over 2,000 ebook titles. Selection Teams made up of representatives from participating libraries selected titles. In order to balance the selection process, each Team included representatives from both public and academic libraries. Team members using email messaging, conference calls and individual work did the selection of titles.

TBLC made MARC records for all purchased titles available to all participating libraries. Staff at TBLC cataloged some of the ebooks and netLibrary supplied the bulk of them. In addition, MARC records for all of the public domain titles, approximately 3,000 titles, available from netLibrary were purchased and provided to participants. Loading MARC records into local library management systems enables complete integration of the ebook collection with the library's other materials. Patrons can locate the ebook record, click on the link in the record and go directly to the book in the netLibrary collection.

A netLibrary trainer provided initial training. Following that session TBLC staff trained library staff at various participating libraries. A netLibrary 101 workshop has been developed to introduce library staff to netLibrary. The workshop will be offered at TBLC and at SWFLN in the fall.

Session	Number of Staff Trained
netLibrary trainer at TBLC	37
TBLC staff at Palm Harbor Library	8
TBLC staff at Clearwater Public Library	18
TBLC staff at Tampa-Hillsborough Public Library	50

Marketing efforts to increase public awareness of the availability of ebooks in their libraries have been a priority. Instructional brochures using the name and LibrarE logo were created and distributed to all participants. On March 6<sup>th</sup>, all LibrarE participating libraries celebrated

eBorrower sign-up day. Staff in participating libraries wore “Are you an eBorrower?” buttons to increase awareness. One library used a laptop/projector setup in the middle of the library to provide live e-borrower demos all day. 30 eBorrowers registered as a result. In addition, the library has a PC dedicated to e-borrower registration in the Reference area.

“Taking E-books for a Test Drive” was published in the March issue of *Computers In Libraries*. The article provided an opportunity to promote the project in the library community. TBLC staff presented a poster session at the 2000 ALA Annual Conference in San Francisco about the project as well.

Use of the collection has generally increased each month. Individual libraries promoting the collection in their newsletters, on websites and with individual faculty members have seen higher use than libraries doing little of their own promotion. Overall use of the collection averages 500 accesses per month. A spreadsheet summarizing use of the collection is included at the end of this report. Use trends indicate that computer science, business and economics, Cliff’s Notes and Idiot’s Guides are used more than other subject areas/series. This trend is in keeping with the commonly held idea that ebooks are best used for obtaining quick pieces of information for reference or referral purposes.

### ***Group Purchases***

TBLC has continued its efforts to coordinate group purchases of electronic resources for member libraries. The level of success has improved as the year has progressed. TBLC has negotiated group purchase discounts for eight products, which have benefited a total of 16 member libraries. Success has increased due to cooperation between TBLC and the Tampa-Hillsborough County Public Library System (THPL). Early efforts to negotiate group purchases were often frustrated by vendors being unwilling to commit to prices until libraries committed to purchases and libraries unwilling to commit to purchases until prices were set.

TBLC, working with THPL, is now able to negotiate price with vendors by having price based on the initial THPL purchase. This provides vendors with a minimum purchase for their products and makes them more willing to commit to discounts for other libraries. Often the discount arrived at includes a lower price for THPL. Early success with this model has encouraged additional vendor products planned for 2000-2001.

Libraries are notified of available offers via bulk mailings, postings to the TBLC e-resources electronic mailing list and the TBLC Team Buying web pages at <http://www.tbtc.org/teambuy>.

The products and library participants are listed in the table below.

<b>Product</b>	<b>Participating Libraries</b>
Novelist	St. Pete Beach Public Library
	Tarpon Springs Public Library
	Citrus County Library System
	Seminole Community Library
	Gulfport Public Library
	St. Petersburg Public Library
	Largo Library
	Pinellas Talking Book Library
	Palm Harbor Library
	Dunedin Public Library
	New Port Richey Public Library
Safety Harbor Public Library	
booksinprint.com	Tampa-Hillsborough Public Library
	Tarpon Springs Public Library
	Palm Harbor Library
Ulrichsweb.com	Tampa-Hillsborough Public Library
Popular Science	Tampa-Hillsborough Public Library
Gale databases	Hillsborough High School
netAdvantage	Tampa-Hillsborough Public Library
Facts.com	Tampa-Hillsborough Public Library
	Largo Library
	Southeastern College
	New Port Richey Public Library
	Tarpon Springs Public Library
	Webber College
Science on File	Safety Harbor Public Library
	Tampa-Hillsborough Public Library
	Largo Library
	Southeastern College

At the end of the year open offers included online access to the Grove Dictionary of Art and Grove Dictionary of Music and Musicians and Wilson Art FullText.

**Concerns**

*Clearwater Public Library Connectivity*

In late June, it was determined that Clearwater Public Library might not be able to participate in unmediated mode. Clearwater had installed a new Polaris system in December 1999 and their Z39.50 server was installed in November 2000. Connection has been established with the Z39.50 server but there are display problems. This project has found that even though Z39.50 is a standard, libraries can “tweak” the server to search and display different ways. This creates a challenge when profiling. Clearwater Public Library has been especially challenging. Currently, we can connect, search, and get a hit count but no BIB or holdings information can display. Epixtech is working on tweaking the URSA Z39.50 client so the information will display. Gaylord has indicated that they are unwilling to include NCIP into their Polaris product as this time. Clearwater will run in mediated mode once the Z39.50 search and display issues have been

resolved. Clearwater continues to urge their vendor to become interoperable with the Anywhere-Anytime Library software.

### ***Data Research Associates Customers***

Late in January 2000, an issue relating to connecting DRA libraries, St. Petersburg (SPIN), Citrus County, Hernando County and Pasco County, became apparent. In order to have full functionality for unmediated interlibrary loan with extended circulation features, DRA needed to cooperate with *epixtech*. The DRA libraries were told that they might be in violation of their contract with DRA if they went ahead with their participation. Connecting these systems was put on hold until the issue was resolved by production of a special DRA URSA Circulation Interface. The interface became available in late September 2000. At that time DRA began to quote costs to the libraries. Following initial contacts between *epixtech* and DRA, we had expected that the cost, if any, would be waived and that St. Petersburg would be a beta test site for the software. This did not occur and the libraries will pay part of the cost while some of the cost will be covered by the grant, either as part of the *epixtech* costs or as a reimbursement to the libraries. The libraries will pay for the ongoing costs as part of the project match. The DRA utility has been installed successfully at three sites. The fourth DRA site (Hernando) has been delayed until the utility can be re-written for the DRA Taos automation system. Hernando is migrating to Taos in November, 2001.

There has been an additional challenge for some of DRA libraries. Citrus and Pasco use a 13 digit barcodes on their items. These barcodes are usable only on other DRA sites. The solution has been to have Citrus and Pasco libraries add a 14-digit "Alleycat" barcode to every item they lend. The "Alleycat" barcodes have been supplied by Tampa, who prints their own barcodes. The barcodes are placed on an Avery 6460 address label, which is a removable label. The removable label allows Citrus and Pasco to re-use the barcodes.

### ***Horizon Customers***

Palm Harbor Library has been *epixtech*'s test bed for testing functionality of the URSA software with new upgrades of their Horizon product. In year one of the project, Palm Harbor was on Horizon version 5.3. With this version we had good connectivity with the Z39.50 server after some tweaking. When they upgraded to Horizon version 6.0 we lost some of the Z39.50 server functions. With the upgrade to Horizon 7.0, all connectivity was lost. *Epixtech* quickly worked to solve the problem and within a week they had an updated Z39.50 server, which performs better than the 5.3 version. Horizon 7.2 will be the release that will contain NCIP, which will allow the extended circulation and patron authentication functions. Beta testing of this version will begin soon. We expect to have it available by early December 2001.

Polk County Library Cooperative has elected to stay on Horizon 5.3 with an updated Z39.50 server for about a year. Their situation at this time prohibits them from making the jump from Horizon 5.3 to 7.2. Their catalog has been connected to the virtual library but has been turned off until the library staff receives training, which is scheduled for completion in November.

### **Training**

From past experience we have learned that the success of introducing new technologies is based upon knowledgeable staff that feel comfortable with the technology and are ready to tell their clients about it and the benefits of its use. When implementing the project at a site, staff

expresses concerns about workflow, job security, unmediated patron access, and specific tasks to be performed. We have met this challenge by providing clear, concise information. We developed a Computer Based Training (CBT) training program that includes hands on experiences or opportunities. TBLC staff have also created an interactive presentation called "Once Upon an Alleycat".

Lauren Stokes developed the Computer Based Training (CBT) course in the fall of 2000. This enables us to train in both mediated and unmediated mode without a live URSA system. The course was written in Authorware 5.2 using a small Access database. The training method is flexible. Individual students working on their own can use it either in a classroom setting with an instructor or independently. The course was tested when the SPIN libraries were trained in February. It serves three purposes:

- 1) Enables a student to be trained without placing real requests in the system,
- 2) Allows staff to be trained independently of their ability to attend a formal class,
- 3) Eliminates the need for connecting to the Internet during training.

To provide added assistance, a cheat sheet for staff to follow was developed and it was included with the CBT. The cheat sheet contains the steps to follow in both the library automation system and the URSA software. If the steps are followed in the correct order the system performs, as it should. When staff does not perform the steps in the correct sequence, URSA map failures occur. Copies of the cheat sheet are provided to staff and the necessity of following all of the steps in the correct order are emphasized during the training sessions. A CD with the CBT is included with the supporting materials for this report.

Karen Wilber and Beth Watson developed an interactive presentation called *Once Upon an Alleycat*. This presentation uses props and library staff in the cast of characters to act out the flow of an Alleycat request through the system. It has been used during library staff development days. An overview of Alleycat is provided for staff at all levels. The presentation is particularly helpful in working with people who do not usually need to work with the software, yet need to know how Alleycat works. The script for the presentation is included in this report.

Staff training on the use of the URSA software was provided to 74 library staff members. During two staff development days 180 library staffers attended the *Once Upon an Alleycat* skit. Staff has also accepted all invitations to talk to community and library groups.

### **Sustainability and Marketing**

This LSTA grant extends the prototype pilot project. The major cost for the URSA software is largely covered by the grant. The libraries and TBLC contribute the human resources and expertise necessary to its success. There are continuing costs for maintenance. The libraries paid an annual fee based on their size. For 2001-2002 the amounts will be changed to reflect 25% of maintenance for basic modules in use at each site plus full maintenance of the OCLC module. Plans are to increase annual fees as needed and to continue to look for corporate sponsorship. Extensive efforts to find corporate sponsors in 2000-2001 were unsuccessful.

### ***Sustainability - Maintenance Fees***

Virtual Library participants paid for second year maintenance and annual license charges at the following rates:

- | <b>\$250</b>                                                                                                                                                                                                                                                                                                                                                                                                | <b>\$500</b>                                                                                                                                                                                                                                         | <b>\$750</b>                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Clearwater Christian College Library</li><li>• Florida Southern College Library</li><li>• Gulf Beaches Public Library</li><li>• Southeastern College Library</li><li>• Seminole Community Library</li><li>• St. Pete Beach Public Library</li><li>• New Port Richey Public Library</li><li>• Oldsmar Public Library</li><li>• East Lake Community Library</li></ul> | <ul style="list-style-type: none"><li>• Dunedin Public Library</li><li>• Largo Library</li><li>• Palm Harbor Library</li><li>• Pinellas Park Public Library</li><li>• Safety Harbor Public Library</li><li>• Tarpon Springs Public Library</li></ul> | <ul style="list-style-type: none"><li>• Pasco County Library System</li><li>• Sarasota County Public Library</li><li>• St. Petersburg Public Library</li><li>• Tampa Hillsborough County Libr:</li></ul> |

### ***Marketing***

As part of TBLC's 1999 Strategic Plan implementation, a marketing consultant was engaged in July 2000. His assignment was to assist in marketing TBLC, libraries in the region, and the Anywhere-Anytime Library. The Cat & Mouse logo, the "couple of clicks, millions of picks" tag line and brochure, and change in name to Alleycat for the virtual catalog and interlibrary loan service of the Anywhere-Anytime Library can be directly attributed to his work. Two promotional activities, one in October for Alleycat and the second in March for Librare were arranged. They are described in the timeline. A major result of his fundraising efforts was a promotional partnership with Home Shopping Network (HSN). The company provided 30 digital cameras to be given away following entry at participating sites in a contest. The contest entries were collected in May 2001. A drawing was held in June at during the SUNLINE Directors meeting at TBLC. The cameras where distributed to the libraries so they could present them to the winners. Several libraries received newspaper coverage of the event. Articles are included in the back of this report.

### **Activities Timeline**

#### **October 2000 – September 2001**

Provided Alleycat support to participating libraries averaging four hours per site for entire year. Performed daily and weekly backups of the database to tape and stored tapes in an offsite location.

The only telecommunications problems have been related to firewalls. The most severe occurred in September 2001, when an Ariel setting was changed in the firewall and it blocked ftp capability to the URSA server.

#### **October 2000 –March 2001**

Negotiations took place to amend the contract with *epixtech*. The amendment was signed in January 2001. It provides for adding libraries and functionality.

Libraries that were started in 1999-2000 (St. Petersburg for SPIN and Pasco County) and were

delayed by the need to develop a circulation interface ordered the necessary software from DRA.

The libraries in the Heartland Library Cooperative were postponed until 2001-2002 because they expected to implement a Polaris system during the second half of the year. They will be ready for implementation in 2001-2002. The Clearwater Public Library worked on compatibility testing of Polaris as described previously.

Functionality of OCLC as library of last resort using Direct Request became available in February 2001. There were sufficient funds to set up the functionality of extended databases and to implement 3 library management systems. SUNLINE (serving 10 libraries), Tampa-Hillsborough (serving 3 libraries) and Sarasota County were the first and largest systems to be implemented in 1999-2000. These were selected to test OCLC as Library of Last Resort.


The tape for the TBLC subset of the Union List of Serials was ordered from OCLC in March. Delivery was in June 2001. This tape was mounted on the Tampa/Hillsborough automation system. It is searchable by all patrons of Alleycat but requests will only be available from patrons who authenticate against those libraries with the OCLC hook.

Remote Patron Authentication (RPA) was purchased by Tampa-Hillsborough for testing as part of the Anywhere-Anytime Library. It requires a separate server, which was also purchased by Tampa-Hillsborough. Due to budget constraints, the participating libraries are being asked to pay for this module. RPA enables remote patron access to commercial databases by authenticating library users on their home library patron database and verifying eligibility to the database vendor. SUNLINE and Sarasota both plan to implement this feature. These libraries will be hosted on the Tampa-Hillsborough RPA server.

### October 2000

On October 3 The Tampa Hillsborough- John Germany Library (Main) and the Sarasota County - Selby Library hosted media events to introduce the "A Couple of Clicks...Millions of Picks" marketing campaign for Alleycat. At the same time new public relations materials and the Cat & Mouse logo came into use. A copy of the brochure and sample of the labels used by libraries to identify Alleycat loans are attached. Libraries also began using these special labels to identify Alleycat loans.

Anywhere-Anytime Library alleycat.tbic.org




**A couple of clicks  
millions of picks**

**Request #:** \_\_\_\_\_

**Due:** \_\_\_\_\_

**Pickup Location:** \_\_\_\_\_

**Return to Circulation Desk**



A service of the  
Tampa Bay Library Consortium

*Funded by the federal Library Services & Technology Act.*

**Sample Label**

Lauren Stokes traveled to the Boston Library Consortium, which was starting a similar project, to describe our experiences with the project to them.

#### November 2000

The Alleycat Sun server was moved from Tampa Main to TBLC. Over the previous months there were several firewall issues at Tampa that interrupted the Internet connection. The technical staff suggested that it would be best for all concerned if TBLC hosted the server. This has provided a more stable Internet connection. As soon as the server was moved to TBLC it was noticed that it added a big load to the T1 line at TBLC. Arrangements are being made to increase service to Super T3 Mbs service.

#### December 2000

The software vendor and North Bay Library Cooperative (CA) successfully beta tested the connection to OCLC. This module enables designation of OCLC as "library of last resort."

Executive Director, Diane Solomon, made a presentation to the Florida Library Network Council describing the Anywhere-Anytime Library and its Alleycat component.

#### January 2001

Lauren Stokes met with SWFLIN to discuss the coordination of virtual library projects for interoperability. SWFLIN subsequently submitted a LSTA project proposal for 2001-2002, which was not funded.

#### February – March 2001

##### ***Software Upgrade***

Alleycat's upgrade to URSA 2.6 was accomplished on February 26, 2001. This new version of the software provides for the OCLC "hook" and extended catalogs. It also redefined the patron "Combined Results" screen with the optional feature of displaying the library locations or count with the titles.

##### ***SPIN Libraries Connected***

The SPIN libraries went into full production using Alleycat on February 20, 2001. This site was delayed by DRA. As indicated in last year's grant report, at DRA's request, a special utility was needed in order for DRA sites to be connected to the URSA software. The URSA software worked with DRA in mediated mode but was problematic for the extended circulation feature. The SPIN libraries are the first DRA sites in the country to use the extended circulation feature. In the first eight days of operation, Alleycat saw a big jump in requesting activity. We also saw a big jump in March with the patrons in south Pinellas County using the system. One librarian at a St. Petersburg branch library passed along a quote from their patron as he checked out his Alleycat loan book - "This is blazingly fast."

##### ***Decision Makers Meeting***

The meeting was held February 2 with 18 participants. All participants except Sarasota County Public Library, Citrus County Public Library and Pinellas Park Public Library were represented. A report on the project was presented. The enhancements for year two were discussed. Ongoing

costs for libraries were outlined and discussed. Year Three plans for the project were outlined with “Alleycat Goes To School” discussed at length and suggestions accepted that the idea be redirected to include “Alleycat Goes To Work”. The minutes are included at the end of this report.

#### ***JAD Participation***

URSA Joint Development (JAD) Group met in Salt Lake City, Utah to view preliminary screens for the new software being developed to replace URSA and RSS (another Interlibrary Loan product by epixtech). Lauren Stokes provided input in regards to the look of the screens and the features clients and staff would like to see in the software. The wish list features were prioritized. Epixtech committed to including as many features as possible in future releases.

#### ***Computers in Libraries Conference***

Karen Wilber and Lauren Stokes presented a program about the Anywhere-Anytime Library project at the Computers in Libraries Conference (Washington DC) in early March. The session focused on implementation strategies and what the project does for member libraries and their patrons, the technical platforms used and challenges faced such as training and publicity.

#### ***Librare Article Published in Computers in Libraries***

Beth Watson and Ellen Cannon published an article about Librare in the March issue of *Computers in Libraries*. A copy of the article is attached.

#### ***April 2001***

##### ***Clearwater Chamber of Commerce***

Lauren Stokes discussed Alleycat with 25 Clearwater business leaders during their weekly chamber meeting.

##### ***Anywhere – Anytime Library Article Published in Computers in Libraries***

Lauren Stokes and Karen Wilber published an article based upon their presentation at the March conference in the April 2001 issue of *Computers in Libraries*. A copy of the article is attached.

##### ***Consortium Sharing***

Lauren Stokes attended the annual Panhandle Library Access Network (PLAN) meeting and presented a 45-minute presentation about the success of Alleycat.

#### ***May 2001***

Direct Request of OCLC is profiled for SUNLINE libraries

New Port Richey Alleycat training for two new hires

Pasco County Alleycat training

St. Pete Beach re-training on Alleycat

Lauren Stokes provided Polk County Library Cooperative directors with an overview of Alleycat

TBLC staff participated in MGT focus group session for statewide virtual library

June 2001

CBT developed by Lauren Stokes was distributed to other URSA users around the country at the ALA URSA Users Meeting

July 2001

Crystal Reports software purchased and installed to improve reports.

***Alleycat Users Meeting***

31 Alleycat users attended the meeting. Beth Watson gave a report about OCLC as Library of Last Resort, which was followed by several questions about how it will work. Lauren Stokes updated the attendees on the topics discussed at the national URSA users meeting at ALA. She also gave an annual report on the project. Diane Solomon discussed the direction of the project in Year Three. The meeting concluded with the awarding of the first annual Alleycat awards. The minutes and awards can be found in the back of this report.

Polk County decides to use mediated mode for their first year of participation.

August - September 2001

August 27 Pasco County Public Library went into full production

***Alleycat Decision Makers Meeting***

Held on August 28, 20 directors or decision makers attended the meeting. All library systems were represented. Lauren Stokes present an annual report on the project followed by an update on new features. There were discussions about using an online patron registration form in conjunction with Alleycat and brainstorming regarding marketing Alleycat during 2001-2002.

Citrus County Public Library – Library profiling begins

Union List of Serials indexes created on Tampa Dynix server, data formatted by epixtech and loaded.

OCLC profiling on URSA and RSS server in progress. Problem develops with RSS server setup. Epixtech works on de-bugging.

Polk County connection established and profiling begins; training is scheduled for Oct/Nov 2001

Discussed Alleycat options with Clearwater Public and set a goal of connectivity and operation for the public in January 2002.

Discussed options for Seminole Community Library. Seminole is a SUNLINE library that is leaving SUNLINE November 1, 2001. They are becoming a joint use library on the Seminole campus of St. Petersburg College. Topics covered included options for keeping borrowing privileges for Seminole's patrons in Alleycat.

**Alleycat Success and Challenges**

SUCSESSES	NOTES
Fostering of cooperation and promotion of resource-sharing	<ul style="list-style-type: none"> <li>• 41 libraries connected</li> <li>• 3 out of 41 are academic libraries</li> <li>• Group purchasing of e-books and databases</li> </ul>
Providing a much needed service to library patrons	<ul style="list-style-type: none"> <li>• Loaning of materials including videos &amp; audios</li> <li>• Patron initiated requests via the Internet</li> <li>• Well received by patrons</li> <li>• Patrons find it easy to use</li> </ul>
Communication	<ul style="list-style-type: none"> <li>• Created and distributed Cat &amp; Mouse and Librare brochures</li> <li>• Maintain project website <a href="http://tblc.org/aal">http://tblc.org/aal</a>; updated monthly</li> <li>• Provided frequent updates to libraries</li> <li>• Users meetings</li> <li>• Decision makers meetings</li> </ul>
ILL impacts – faster, less cost, more efficient; redefined workflow	<ul style="list-style-type: none"> <li>• Drastic reduction in OCLC use by smaller libraries</li> <li>• Finding items locally – within the virtual catalog participants</li> <li>• Receiving items significantly faster</li> <li>• Easier to package items for shipping (DLLI) instead of USPO</li> <li>• Significant &amp; positive impact on library service</li> <li>• Redefining ILL workflow</li> </ul>
TBLC support	<ul style="list-style-type: none"> <li>• Helped libraries resolve workflow issues</li> <li>• Developed item identifier</li> <li>• Bulk purchasing of book labels, &amp; brochures</li> <li>• Providing DDLI Labels templates with addresses</li> <li>• Responding to feedback issues</li> <li>• Fostering cooperation among ILL staff</li> </ul>
Elimination of paperwork trail	<ul style="list-style-type: none"> <li>• Software tracks request through entire process</li> <li>• Completed requests kept for 60 days</li> <li>• Patron can review status of current requests at anytime</li> </ul>
Training	<ul style="list-style-type: none"> <li>• Re-training of library staff at some libraries</li> <li>• On-site for new library staff participants</li> <li>• Users’ meeting – review of training procedures</li> <li>• Developed Computer Base Training (CBT) program for participants and shared with other URSA users</li> </ul>
Promotion by TBLC	<ul style="list-style-type: none"> <li>• Partnership with Home Shopping Network</li> <li>• Staff meetings</li> <li>• Community meetings</li> <li>• Brochures for libraries</li> <li>• Supplying press releases</li> </ul>
Promotion by libraries	<ul style="list-style-type: none"> <li>• Press releases</li> <li>• Mention at group talks such as home schooling parents, book discussion groups, library web sites, OPAC computers</li> </ul>
Vendor cooperation	<ul style="list-style-type: none"> <li>• Good working relationship with epixtech</li> <li>• On average 3 days per week contact with Ken Adams of epixtech support</li> <li>• Receptive to changes in software</li> </ul>

CHALLENGES	NOTES
Gathering configuration information	<ul style="list-style-type: none"> <li>• New libraries seem to require a lengthy period of time to complete profiles</li> </ul>
Library staff concerns	<ul style="list-style-type: none"> <li>• Change in work flow – some tasks moved out of ILL department to circulation and/or reference</li> <li>• Increased volume of requests</li> <li>• Afraid of losing job</li> <li>• Patrons would obtain unnecessary materials</li> <li>• Patrons would request too many items</li> </ul>
Outside Influences - Gaylord	<ul style="list-style-type: none"> <li>• Lack of cooperation by Gaylord with epixtech</li> <li>• Getting Gaylord to develop NCIP in their Polaris product</li> </ul>
Library staff - difficulty following procedures in performing certain tasks	<ul style="list-style-type: none"> <li>• Change status of item</li> <li>• Using correct DLLI address labels</li> <li>• Putting correct information on book band</li> <li>• Failing to use feedback button for issues</li> </ul>
Technology	<ul style="list-style-type: none"> <li>• We are on the cutting edge of technology for NCIP and RPA development</li> </ul>

## **Objectives**

In the grant application TBLC outlined two major objectives for the expansion of the prototype pilot project.

The objectives were:

Bring enhanced functionality to the initial year one participants (remote patron authentication and OCLC as the Library of Last Resort).

Expand the regional virtual catalog and interlibrary loan system to include additional public library systems in the region.

At this juncture we are well on the way toward fully meeting these objectives. As with most technology projects, timelines are a challenge to maintain. Variables such as software readiness, configuration delays and optimistic expectations abound in this type of project.

### **Objective 1**

#### ***OCLC as Library of Last Resort***

This module enables designation of OCLC as “library of last resort.” It enables participating libraries to mediate interlibrary loan requests for materials not located in the region. The software vendor and North Bay Library Cooperative (CA) successfully beta tested the connection to OCLC in December 2000. The URSA software upgrade in February 2001 provided for communication to the libraries’ OCLC Direct Request accounts. Profiling of Direct Request for the SUNLINE libraries was completed in June 2001. We had elected to start with connecting the SUNLINE libraries to OCLC first, as they were the most complicated. In July, epixtech purchased a new RSS server, which is required to move URSA requests to OCLC. Testing with a live request was done in July on the new RSS server. With this initial test it was realized that the

request processing did not flow correctly. It was not until the beginning of October that the vendor resolved the problem. TBLC expects to implement this module in all the participating libraries by the end of 2001.

As part of the OCLC addition, five additional "extended" catalogs will be added to the virtual library. These include SUS (State University System), CCLA (Community Colleges), the State Library, the Florida subset of WorldCat and the TBLC subset of ULS (Union List of Serials).

The TBLC subset of ULS was obtained from SOLINET in April and has been loaded and indexed on the Tampa-Hillsborough's Dynix server in a separate database. Once the OCLC module is turned on this database and the other four catalogs will be connected via the Z39.50 standard.

### ***Remote Patron Authentication (RPA)***

Tampa Hillsborough purchased and implemented the software for use on their automation system. Epixtech, Tampa Bay Library Consortium and Tampa Hillsborough have been testing the interoperability of the RPA software and URSA. An initial problem was discovered with RPA authenticating against a DRA site. Several DRA sites in the region use 13-digit patron barcodes instead of 14-digits barcodes. Epixtech has developed a small utility to add to RPA that will nightly get a flat file of patron names and barcodes from a specific site. With this file, a patron database for that DRA library is built on the RPA server for patrons to be authenticated against. This will require the DRA site to run a query against their patron database whenever they want the RPA patron database updated and place it the specific location.

By the end of 2001 we anticipate the initial participants, who wish to use RPA, to be setup on the RPA server.

## **Objective 2**

In year one, we demonstrated that it is possible to create a virtual catalog with 23 libraries represented and more than 1 million machine-readable bibliographic records. 1,152,586 registered library patrons had access to the virtual library. In Year Two we expanded the virtual catalog to include 18 additional libraries. Due to several issues, implementation has not been as quick as we had hoped.

We had several challenges with some of the new libraries we were adding. The challenge with Citrus County Public Library and Polk Public Library Cooperative has been with timing of implementing a new service. Currently, both of these systems are being profiled in the URSA software. Training of library staff is scheduled for November and December. Both sites are scheduled to come online before the end of 2001.

Epixtech and Clearwater Public Library have been working with Gaylord to have them include NCIP into the Polaris software. NCIP is a required standard for automation systems that use the client/server technology. It replaces the telnet connection that was previously used. NCIP allows patron authentication and circulation functions to be performed. Gaylord informed Clearwater in September that the development of NCIP was indefinitely put on hold. Clearwater has agreed to be setup in "mediated" mode and use RPA's flat file utility to create a patron database to authenticate against. This should be completed by January 2002.

Hernando County Public Library (DRA) was scheduled to be connected this year. After the annual DRA users meeting in March 2001, Hernando decided to upgrade their automation system to the new TAOS platform. With the implementation of a new automation system, it was not

feasible to add them to the virtual library in Year Two. They are on the schedule for implementation in Year Three.

Heartland Public Library Cooperative in February 2001, decided to upgrade their automation system to Gaylord's Polaris. This has pushed their implementation back to early 2002. They will be setup the same way as Clearwater unless Gaylord comes through with NCIP.

The following spreadsheet lists the current participating libraries, the number of registered patrons reported by each library, the number of volumes records reported by each library and the county in which each library is located. The last column indicates the date the records for the library became accessible within the gateway for real-time searching.

### Alleycat Libraries - Statistics

Library	Number of Registered Patrons	Number of Volumes	County	Date Available
Citrus County Public Library	50,544	144,042	Citrus	November 2001
Clearwater Christian College Library	984	92,491	Pinellas	30-May-00
Clearwater Public Library	131,734	455,807	Pinellas	January 2002
Dunedin Public Library	40,158	125,316	Pinellas	30-May-00
Eastlake Community Library	4,070	20,584	Pinellas	30-May-00
Florida Southern College Library	3,606	155,301	Polk	30-May-00
Gulf Beaches Public Library	14,024	69,814	Pinellas	20-Feb-01
Gulfport Public Library	6,807	72,744	Pinellas	20-Feb-01
Largo Public Library	79,253	231,013	Pinellas	30-May-00
New Port Richey Public Library	17,320	58,071	Pasco	30-May-00
Oldsmar Public Library	14,128	32,208	Pinellas	30-May-00
Palm Harbor Library	41,571	94,502	Pinellas	30-May-00
Pasco County Library System	182,309	535,181	Pasco	27-Aug-01
Pinellas Park Public Library	43,909	139,529	Pinellas	30-May-00
Polk Public Library Cooperative	78,353	667,305	Polk	December 2001
Safety Harbor Public Library	13,771	73,877	Pinellas	30-May-00
Sarasota County Public Library	233,030	720,502	Sarasota	30-May-00
SE College Library	2,302	93,165	Polk	30-May-00
Seminole Library	28,725	78,860	Pinellas	30-May-00
St. Pete Beach	6,452	39,566	Pinellas	20-Feb-01
St. Petersburg Public Library	108,726	423,796	Pinellas	20-Feb-01
Tampa Hillsborough Public Library	666,038	1,391,791	Hillsborough	30-May-00
Tarpon Springs Public Library	22,847	96,037	Pinellas	30-May-00
<b>TOTAL</b>	1,790,661	5,811,502		

## **Outcomes**

We had two outcomes for this project:

- Public use technology to get information
- Participants learn to use technology

### ***Public Use Technology***

## **Statistics**

The measurement of public using technology is done by counting the number of hits on the virtual library web site and the number of filled requests for ILL items. In the period from Oct 1, 2000 to September 30, 2001 the web site had 58,547 hits recorded and number of filled requests totaled 14,865 out of the 21,908 requests placed. This is a 68% fill rate.

Included in the supporting documents there are statistics showing Alleycat Requests and Loans. Graphs showing “Current Statistics – Requests (June 2000-September 2001),” “Current Statistics – Loans (June 2000-September 2001),” “Fill Rate” and “Days To Ship” graphically demonstrate several significant observations.

It can be observed that when the SPIN libraries went live in March 2001 and when the Pasco county Library Cooperative went live in July 2001, there were surges in requests and filled loans. The residents of these areas had been eagerly awaiting access to requesting on Alleycat. It is also interesting to note that the fill rates remain steady throughout the period at about 70% and the days to ship averages 1.5 days.

## **Surveys and Comments**

Measurement of user satisfaction was done twice during Year Two of the project with email surveys. The surveys were conducted at the beginning of March 2001 and the end of September 2001. Both surveys asked the same questions with the exception of the September survey. In September, an additional question about the patron’s age range was asked.

### **Patron Survey**

Surveyed patrons were selected by locating patrons who had completed at least one request between the period of March 1, 2001 and September 24, 2001 and had submitted an email address. The list of email addresses was created and duplicates addresses eliminated. The survey was created in an email message and the email addresses were pasted into the “Blind Copy” (BCC) mail heading so patron’s privacy was protected. Patrons responded rapidly, with most responses being received with in the first 48 hours after the survey was sent. The results were tallied in an MS Access database, queries were run, the totals for each answer where placed into an MS Excel spreadsheet and percentages were calculated. The spreadsheet of patron survey results follows.

### Patron Survey

	March 2001		September 2001	
Number of surveys emailed	206		515	
Number of Responses	76		163	
	37% Return Rate		32% Return Rate	
Question	Mar-01	%	Oct-01	%
<b>1. Requesting an item from Alleycat was...</b>				
No response to question	2	2.63%	1	0.61%
___ Very easy	53	69.74%	117	71.34%
___ Somewhat easy	18	23.68%	40	24.39%
___ A little difficult	3	3.95%	6	3.66%
___ Very difficult	0	0.00%	0	0.00%
<b>2. How long did it take to receive the item you ordered?</b>				
No response to question	6	7.89%	3	1.83%
___ 1-2 days	6	7.89%	4	2.44%
___ 3-4 days	24	31.58%	51	31.10%
___ 5-7 days	29	38.16%	67	40.85%
___ More than 7 days	11	14.47%	39	23.78%
<b>3. Where do you normally use Alleycat?</b>				
No response to question	0	0.00%	1	0.61%
___ Home	40	52.63%	130	79.27%
___ Work	19	25.00%	15	9.15%
___ In the library	17	22.37%	16	9.76%
___ Other		0.00%	2	1.22%
<b>4. How did you learn about Alleycat?</b>				
No response to question	1	1.32%	1	0.61%
___ Brochure	5	6.58%	21	12.80%
___ Library staff	33	43.42%	59	35.98%
___ Local community meeting	0	0.00%	1	0.61%
___ Newspaper or magazine article	2	2.63%	8	4.88%
___ Library promotional	5	6.58%	8	4.88%
___ Internet search	8	10.53%	11	6.71%
___ Library website	13	17.11%	40	24.39%
___ Other	9	11.84%	9	5.49%
2 responses			4	2.44%
3 responses			2	1.22%

<b>5. Will you use this service again?</b>					
No response to question		0.00%		0	0.00%
Yes	71	93.42%		160	97.56%
No	0	0.00%		0	0.00%
Maybe	5	6.58%		4	2.44%
<b>6. How satisfied were you with the service you received?</b>					
No response to question		0.00%		0	0.00%
Delighted	47	61.84%		115	70.12%
Satisfied	23	30.26%		36	21.95%
Somewhat satisfied	5	6.58%		12	7.32%
Not satisfied	1	1.32%		1	0.61%
<b>7. How many times have you used Alleycat?</b>					
No response to question		0.00%		0	0.00%
1-2 times	21	27.63%		42	25.61%
3-5 times	21	27.63%		47	28.66%
6 or more times	34	44.74%		75	45.73%
<b>8. Age</b>					
No answer				2	1.22%
0-12				1	0.61%
13-19				0	0.00%
20-40				38	23.17%
41-65				106	64.63%
66+				17	10.37%

In March 76 out of 206 (37%) users answered the survey and In September 164 out of 516 (32%) responded to the surveys. There was little difference in the responses between the two surveys. One significant difference was in use of the service from home. ***The percentage of people who used Alleycat from home increased from 53% in March to 79% in September.***

When asked if the software was easy to use, 96% of the respondents indicated that it was very easy or easy. When asked about satisfaction with the service, there was an increase between March (62%) and September (70%) of respondents who indicated that they were “Delighted” with the service they received in obtaining materials. In both surveys, 92% of the patrons were either “Delighted” or “Satisfied” with the service.

For the September survey, an age range question was added. It was interesting to note that 65% of the patrons responding were between the age of 41-65, 24% between the age of 20-40, and the 66+ category made up only 11% of the respondents. There was only one person under the age of 20 who responded.

Comments were also part of the survey. From those comments we were able to develop a Patron Wish List.

### Patron Wish List

- All libraries in the state should participate in a virtual library
- All media should be requestable
- Be able to cancel requests (feature added in February 2001 but item must be in “Pending” status)
- If home library has item available have virtual library place request on home library’s copy (currently have to go to the library’s website and repeat search to place the hold).
- Renew items
- Get all items requested

For graphic representation of results see the supporting documents. Also included in the supporting documents is a representative listing of Alleycat Patron Survey Comments. Users of the service were very generous in their response to the request for comments.

### Staff Survey

A library staff survey was sent via email in March 2001. The survey was sent to the library directors who where instructed to distribute the survey to their staff members who used Alleycat in staff mode. Twenty-two library staff members responded. The results are listed below:

Questions	March-01	%
<b>1. Do you request items from Alleycat for your patrons?</b>		
No response to question	0	0%
___ Frequently	6	27%
___ Sometimes	15	68%
___ Never	1	5%
<b>2. How easy do you find the URSA (Alleycat) software to use?</b>		
No response to question	0	0%
___ Very easy	11	50%
___ Somewhat easy	7	32%
___ A little difficult	4	18%
___ Very difficult	0	0%
<b>3. Do you have a link on your library’s homepage for Alleycat?</b>		
No response to question	0	0%
___ Yes	20	91%
___ No	2	9%

<b>4. How do you promote Alleycat in your library? (You may choose more than one)</b>		
No response to question	0	0%
___ Brochures for patrons to pickup	1	5%
___ Tell patrons	1	5%
___ Show patrons how to use it	0	0%
All of the above	12	55%
2 of the above	14	64%
___ We do not promote Alleycat	0	0%
<b>5. Do you feel other libraries are filling borrowing requests...</b>		
No response to question	0	0%
___ Very quickly	5	23%
___ Somewhat quickly	12	55%
___ About the same as before Alleycat	2	9%
___ Slower than before Alleycat	0	0%
<b>6. Do you feel your library is filling lending requests...</b>		
No response to question	0	0%
___ Very quickly	12	55%
___ Somewhat quickly	5	23%
___ About the same as before Alleycat	2	9%
___ Slower than before Alleycat	0	0%
<b>7. Has the number of your Interlibrary Loans...</b>		
No response to question	0	0%
___ Increased	15	68%
___ Decreased	0	0%
___ Stayed about the same	4	18%
<b>8. Has the amount of time you spend on Interlibrary Loan requests...</b>		
No response to question	0	0%
___ Increased	9	41%
___ Decreased	4	18%
___ Stayed about the same	5	23%

Questions	March-01	%
<b>9. Has your use of OCLC..</b>		
No response to question	1	5%
___ Increased	8	36%
___ Decreased	12	55%
___ Stayed about the same	0	0%
___ We never use OCLC	1	5%
<b>10. In the past 6 months, have you called TBLC with a support question about Alleycat?</b>		
No response to question	0	0%
___ No	1	5%
___ Yes	1	5%
<b>If yes then: How quickly was your question handled?</b>		
No response to question	0	0%
___ Response within 24 hours	8	36%
___ Response within 25-48 hours	2	9%
___ Response took more than 48 hours	0	0%
___ Never heard from TBLC Support	0	0%

Comments
Keep up the great work! Alleycat is a real plus for us.
Since implementing Alleycat, it has increased our staff time on ILL requests.
I recommend the service to my library users who have Internet service at home.
It's a wonderful service and I love the name Alleycat.
Alleycat is fabulous!
We plan to add a link on the library's web page soon. We would like to see an option to renew on Alleycat.
Depending on the circumstances, our library uses many forms of ILL: system holds, faxes, Alleycat, OCLC. This survey may not accurately represent ILL's at our library.

**Comments**

However, I would suggest that the libraries send periodic e-mails to patrons who have provided their e-mail addresses to inform and/or remind them of this service and how it can be used. I would also make sure that patrons know that they can contact their libraries for interlibrary loans of materials that don't come up on Alleycat searches or that they can make Alleycat requests at the library in case they aren't computer literate. In addition, more information regarding the subject matter of materials would be of great assistance when searching by subject matter. This is a great program and a good way for libraries to adapt themselves in order to keep themselves relevant to the needs of the public. Thank you.

***Participants Learn to Use Technology***

The number of people who attended training, meetings and staff development sessions are the measurements for this output.

**Training**

225.5 hours of training was given for 74 library staff members for the South Pinellas InterLibrary Network (SPIN) & Pasco County Library Cooperative when they were brought online with Alleycat. The training was done on site using the URSA CBT, which was developed by Lauren Stokes.

**Staff Development Days**

Participating libraries have requested TBLC to come to their staff development days to present a twenty-minute session about Alleycat. After doing a couple of these with PowerPoint presentations we felt that something different needed to be done. Karen Wilber and Beth Watson created a skit called "Once upon an Alleycat". We used the library staff to fill the cast of characters, giving them props to help act out the life of an Alleycat request. We used cue cards for their lines. The TBLC staff person is the narrator. The script and props list for the skit may be found in the back of this report. This turned out to be a great way to explain Alleycat to library staff that normally does not use Alleycat. Since they are participating in the role-playing they seem to retain the concepts. One library has expressed an interest in using the skit for a patron introduction into Alleycat. The 20-minute skit was presented to 120 library staff members at Pasco County Public Library and 60 library staff members at Sarasota Public Library in October 2001. Development was in 2000-2001.

**Alleycat Meetings**

TBLC hosted three meetings during Year Two of the project. Two of the meetings were for "decision makers" and the third for ILL staff members. Attendees were given a review of the project, updated on future features of the software and received answers to their many questions. Minutes and handouts for the meetings can be found at the end of this report.

## **Staff Resources**

### ***TBLC Project Staff:***

#### **Lauren Stokes - Automation Services Support Coordinator**

Lauren is the project manager. .5 FTE of Lauren's time in 2000-2001 was allocated for this project. Her responsibilities have included vendor negotiations, interacting with, informing participants, and working with Tampa-Hillsborough County library staff to set up and maintain the SUN server, library staff training and technical evaluation.

#### **Beth Watson - Assistant Director**

Beth is the lead person for the electronic resources aspect of the project. Beth is working with an Electronic Resources Special Interest Group and a working group called the Electronic Resources Task Force. All TBLC member libraries are included in the electronic resources initiative. Development of the regional or statewide Union List of Serials (ULS) as a locally mounted database will be part of Beth's responsibility. At this time, Beth is the TBLC OCLC ULS expert.

Beth is also a trainer and back up support person. Beth spent .24 FTE of her time on project related activities.

#### **Karen Wilber – Continuing Education Coordinator**

Karen is the third member of the TBLC training team and provides training and back-up support. She is included in the three-person support triage team. She has spent .04 FTE of her time on the project.

#### **Diane Solomon – Executive Director**

Diane is responsible for overall coordination of the project. This required .11 FTE of her time.

### ***Staff of Participating Libraries***

Participating libraries are part of the governance of the virtual catalog segment of the project and send staff for training. Staff is trained upon implementation of the project and when new functionality is added. Each library has a designated contact person who is included in an electronic distribution list. That person is expected to communicate with senior management and line staff regarding the project. The larger library systems have a designated "expert" who is a trainer and is able to provide first level trouble shooting assistance. Libraries with only one outlet turn to TBLC or the nearest library with an "expert."

Attendance sheets for training conducted by TBLC and informational and governance meetings document that there were 143 attendees (74 attended training sessions) of sessions held between October 2000 and September 2001. This resulted in 433 contact hours. In addition, staff spent time traveling to these staff development workshops. For minimal reporting purposes, this has been translated into an average loaded salary of \$21 per hour times the number of contact hours, resulting in a minimal estimate of \$9,093 for the value of dedicated staff time.

The SUN Server was housed at the Tampa-Hillsborough County Library but was moved to TBLC in November due to problems with Internet connections. Lauren Stokes is responsible for this equipment. Ben Ostowsky of TBLC assists with updates of the OS when new patches are made available, maintains Internet connectivity and the firewall configuration.

Staffs of member libraries were active in selection of *Librare* titles and actively worked collaboratively and individually for countless hours.

## **The Future**

### ***Year Three of project***

The Anywhere-Anytime Library has received LSTA grant funding for an expansion project for Year Three. Ours plans are to:

- Add as many of the remaining public libraries as possible and the University of Tampa
- Expand the Virtual Library website into a “web portal”
- Include Remote Patron Authentication to online data bases
- Market the virtual library to the community

This is a demonstration pilot project that TBLC is committed to working to develop interoperability with a statewide virtual library project. In order to maintain the virtual library structure, the project will need to be self-sustaining. The participants have agreed to pay one-quarter of the annual software maintenance in year three. These fees are established in the contract with *epixtech*.

### ***Funding and Fees***

The current virtual library participants will pay the maintenance and annual license charges at the following rates:

<b>System</b>	<b>Cost</b>
SUNLINE	\$2,125
SPIN	\$1,375
Tampa Hillsborough	\$1,250
Pasco	\$1,250
Sarasota	\$1,250
Pinellas Park	\$1,000
Palm Harbor	\$750

The libraries coming in at the end of the year will start to contribute in year four. All libraries that implement other features such a OCLC as Library of Last Resort will pay the full maintenance fee after the initial trial period.

### ***Expansion Grant Participants***

The Anywhere-Anytime Library Expansion grant is designed to add the following libraries. They are shown arranged by their library management systems:

#### **DRA Classic**

- Hernando County Library

#### **Polaris from Gaylord**

- Heartland Library Cooperative
  - Desoto
  - Hardee
  - Highlands
  - Okeechobee

#### **Endeavor**

- University of Tampa

### ***Additional Functionality***

#### **Remote Patron Authentication and Commercial Databases**

In addition, the Year Three project will provide additional functionality. This includes Remote Patron Authentication (RPA) for access to the electronic resources purchased by participating libraries.

Remote Patron Authentication (RPA) is the term used for using the library card number of the patron to determine if they are eligible for access to a vendor supplied on-line database. Vendors sell access to full text and other informational on-line databases and require that the library limit that access to their registered patrons. Until now, it has been cumbersome to do this for people outside of the walls of the library. Vendors have been reluctant to sell access to information databases unless the library can provide password verification or verification based upon the Internet server address. Libraries desiring the feature as a match for the grant will implement the remote patron authentication feature.

RPA addresses the need for a mechanism to enable remote (home or office – anywhere or anytime) clients to use purchased databases such as full text articles from periodicals or newspapers. RPA in conjunction with databases purchased by libraries will provide residents with the full advantages of a virtual library 7-day/24 hour library.

TBLC will continue to work with member libraries, the State Library, SOLINET and others to provide electronic resources at group prices. The Electronic Resources Task Force and Special Interest Groups are expected to continue to function.

#### **Database Access to the Union List of Serials**

As part of the Year Three project TBLC plans to upgrade the Union List of Serials (the combined listing of all magazines owned by Florida libraries) to the entire listing. Currently, only the TBLC members are searchable. The TBLC subset includes 40,891 local data records in 86 cooperating libraries. By the end of Year Three it is planned to make available the entire Florida subset of the Union List of Serials. This will provide access to 269,161 local data records representing holdings in 245 libraries.

Since the list will be searchable by guests from anywhere at anytime, it will greatly enhance the value of the Anywhere-Anytime Library for all residents of Florida. Once the tie in to OCLC as the library of last resort is implemented (described elsewhere in this report), it should be possible for authenticated library cardholders in Anywhere-Anytime Libraries to utilize OCLC Direct Request features to request periodical articles from any lending library on the statewide listing.

Use of the URSA software as the search engine for the Union List of Serials was established in Year Two. The TBLC subset of the Union List of Serials was mounted on Hillsborough County Library Cooperative server and they maintain it as a separate local database for use by everyone in the project.

Patrons use URSA to request items through the Direct Request (OCLC) by implementing an OCLC feature called custom holdings. The Union List of Serials combined with remote patron authentication will enable residents to search beyond the regional virtual union catalog to find materials not owned by participating libraries and to place requests for these materials.

## **Summary**

The **Anywhere-Anytime Virtual Library** pilot project demonstrates that cost-effective, easy to use, patron empowered, regional resource sharing is possible now. By providing bibliographic access, holdings status, unmediated interlibrary loan and patron authentication for access to library resources, this project forges new ground in linking libraries via technology based upon inter-institutional cooperation. The project is well on the way to fully meeting its primary objectives.

We have found that once a library is setup and running on the URSA software, there is very little maintenance, retraining or assistance required. The work involved is in the setup and initial training of library staff.

Overall the efforts pay off when users begin to see the results. It is particularly gratifying when comments are returned such as:

- ❖ Thank you for Alleycat. I love having easy access to materials my local library doesn't own.
- ❖ Great stuff. Keep up the good work. ADD MORE LIBRARIES!!!!
- ❖ Overall I'm very satisfied and find this to be one of the better services offered through any public facility.

## Supporting Documents List

LibrarE Top Check Outs  
LibrarE Article  
CBT tutorial CD-Rom  
Once Upon an Alleycat script and handout  
LibrarE Brochure and Are you an eborrower button  
Cat & Mouse Brochure  
HSN Promotion  
Samples of News Releases and Print Coverage  
Creating Alleycat Article  
Participant Meeting Materials  
    Minutes from Users & Decision Makers Meetings  
First Annual Alleycat Awards  
Patron Survey  
    e-mail  
    Graphic Results  
    Alleycat Patron Survey Comments  
Statistics  
    Graphic Representations  
    Loan Statistics - Spreadsheet  
    Request Statistics - Spreadsheet

Contracts  
    *Epixtech* for URSA  
    NetLibrary for *E-Books for Libraries*