

I. NARRATIVE.

Attach a narrative status report of project accomplishments to date. Describe the extent to which the project has met its outcomes. Discuss programs, activities and how the library is using data collected to improve the project.

The Tampa Bay Library Consortium's Anywhere– Anytime Library Expansion project for 2001-2002 is designed to bring together the rich resources of Tampa Bay libraries for access by anyone, at anytime, from anywhere, via the Internet. To accomplish this TBLC expects to:

1. Create a virtual library umbrella web site for use by the public
2. Expand the pilot regional virtual catalog and interlibrary loan system to include all public library systems in the region
3. Enable customers of the participating libraries to request that needed materials be loaned for their use and delivered to their local library.
4. Further the implementation of remote authentication of customers for home and office access to on-line databases and the implementation of software that will forward requests for items not found in the region to OCLC for interlibrary loan processing.

This project brings the world of library materials directly to the customer.

1. Create a virtual library umbrella web site for use by the public *The Anywhere-Anytime Library web portal*

To fully realize the intent of the Anywhere-Anytime Library project our goal is to integrate its various aspects under a common umbrella. To do this, the Anywhere-Anytime Library's web presence is being developed into a web portal. The portal is being designed with a public side and a private side in the same way that government and corporate sites have internal and external aspects. Having a separate internal portion of the web site will enable mounting of instructional and information materials for staff on secure pages. The separate faces of the web site will allow us to customize screens for public consumption while still maintaining the site as a useful tool for Anywhere-Anytime participants to gain access to statistics and training.

As part of the 2001-2002 LSTA funded project TBLC hired a Webmaster in November 2001. Brian Jones brings corporate web design experience to the Anywhere-Anytime Library Team. He has completed initial design, layout and programming concepts for the TBLC Anywhere-Anytime Library site and sites for related services—Alleycat, Reciprocal Borrowing and Librare. The final designs apply site branding, color concept and logo recognition to each service. Design concepts are included as supplemental material to this report.

The new site layout consists of new navigation as well as sub-navigation. It has been redone to make the navigational system more intuitive and useful. The site layout also determines how information is arranged on the site. It will now have a constant left-side navigation as well as sub-navigation to help the user find information faster and easier than before. Brian has begun the initial programming phase utilizing the new design, navigational and layout concepts. This phase includes the creation of code templates that will apply to every web page. The plan is to

ensure consistent navigation, links, type style, and other features. Server side functionality will also be determined and implemented during this phase.

In addition to the overall look and feel of the program sites, the Webmaster has designed an Alleycat logo as a branded character to be used as a program mascot. This mascot will be used on the Alleycat website as well as the logo used on shirts, mouse pads and other promotional materials. Promotional items will be used to market the service to the general public. An early depiction of the Alleycat mascot is included.

We are delighted with the progress that is being made on this aspect of the project.

2. **Expand the pilot regional virtual catalog and interlibrary loan system to include all public library systems in the region - Alleycat**

Alleycat is the virtual catalog and interlibrary loan portion of the Anywhere-Anytime Library. During the course of this grant year we have seen a marked increase in Alleycat requests over the previous year. This is due to the addition of three library systems—two at the end of the previous grant cycle, and one early in this year. The following timeline illustrates growth in the use of Alleycat so far this grant year.

September 2001	2018 Alleycat requests are filled this month.
December 2001	Polk County Library Cooperative goes live on Alleycat This includes public libraries in Bartow, Lakeland, Winter Haven, Auburndale, Eagle Lake, Haines City, Ft. Meade, Lake Wales, Mulberry, Polk City, Dundee, Lake Alfred, Frostproof, the Polk County Historical and Genealogical Library and the Polk County Law Library.
January 2002	3144 Alleycat requests are filled this month
February 2002	Citrus County Library System goes live on Alleycat

The total number of **requests** and **loans** has increased exponentially over last year. Requests increased more than 4.7 times and loans increased more than 2.5 times.

Period	Requests	Loans
Oct 00 – Feb 01	4656	4486
Oct 01 – Feb 02	21958	11562

Two new library systems have gone live so far this grant year. It takes up to six months to bring a library live. Many steps need to be followed. The process starts with requests to the library for final profiling information, continues with *epixtech* mapping to the new server, includes training operational staff and front line staff, provides for testing connectivity of the target server and concludes with going live and publicizing the new service to the public. The process takes less time if extended circulation and unmediated service is implemented later.

The libraries in the **Polk County Public Library Cooperative (PCLC)** were connected in December 2001. The PCLC system uses *epixtech*'s Horizon library management system. This Horizon system has been implemented in mediated mode with no extended circulation. PCLC

staff must mediate all incoming and outgoing requests. This means that PCLC staff must enter all patron requests and perform all of the circulation steps manually when an item is received. Patrons of other libraries may request materials in Alleycat and the requests are routed to the central server in Bartow, and then redistributed manually to the owning libraries to be filled. This is a cumbersome and time-consuming process. Little did the libraries expect to receive 150 requests daily on the system. They rapidly learned that small collections can be big lenders in a widely available environment. Help is on the way. In January we were able to negotiate an unlimited user license from *epixtech* for Remote Patron Authentication (RPA) for Alleycat. This will be implemented in April 2002 for Polk County. A grant revision was requested and approved for us to substitute RPA for other functionality that is not yet ready and to purchase a small, dedicated server for RPA. RPA will enable the residents of Polk County to authenticate against their patron file and have access to unmediated interlibrary loan – place their own requests. The extended circulation feature of the project will be implemented in Polk County when the NCIP protocol becomes available in their Horizon system. NCIP is scheduled for inclusion with a Horizon upgrade in late summer 2002.

The **Citrus County Library System** came up live for the public on Alleycat, with full functionality, on February 22, 2002. The profiling and other work was completed by early fall 2001 and a connectivity problem emerged during testing. As is common when complex systems are involved, it took months to pinpoint the problem and determine rather than it being a z39.50 issue, it was due to Internet connectivity complications with their provider, Sprint.

The Macdonald-Kelce Library at the **University of Tampa** is currently being profiled for addition to Alleycat. We anticipate their implementation to be complete in May 2002.

The agility of being able to implement RPA will enable other sites that are already in process of set up to actually go live for the public within the next several months. At **Clearwater** and **Heartland**, Gaylord's Polaris customers where Z39.50 challenges are being addressed, RPA will be implemented to enable unmediated interlibrary loan for their patrons as soon as the z39.50 issues are resolved. **Palm Harbor** has been operating in unmediated mode since very early in the project. They have a **Horizon** system. RPA will be implemented for them once it is operative in Polk County.

One of the expectations when piloting innovation is that there will be challenges. A big part of this project is testing new ways to improve access to information and materials for residents of the region. Working to link disparate library management systems (LMS) has proved to be the biggest challenge to this project. Expectations are often ahead of the technology. We have embraced the challenge to being leaders in this exciting service development.

System upgrades and changes are the other obstacles to full region-wide implementation or all of the modules. Care is being taken to implement the service after new library management systems (LMS) have been operating successfully in participating libraries. Once a system is up and running downtime only occurs when the library makes a change to its configuration. While frustrating, we recognize this as a necessary situation in a fast changing technology environment. Changes to a local LMS setup often effect Alleycat. The URSA software is told what to do by screen recognition, in a process called mapping. When

the screen is changed the software no longer recognizes the screen, thus, it does not know how to proceed. We have cautioned all participants to notify the project coordinator when they are making changes or system upgrades so we can anticipate mapping errors. Once all LMS vendors implement the NCP protocol, interoperability of different systems will become easier and more reliable.

3. Enable customers of the participating libraries to request that needed materials be loaned for their use and delivered to their local library – Remote Patron Authentication

Remote Patron Authentication (RPA) enables remote patron access to Alleycat as described for Horizon and Polaris sites. It also can be applied to authenticating library users on their home library patron database and verifying eligibility to access commercial databases. Originally, all of the Alleycat libraries were going to be invited to individually purchase the RPA software. The server owned and used by the Hillsborough County Library Cooperative for this purpose was going to host what was viewed as an add on service. During testing of this software by the staff of by the Hillsborough County Library Cooperative, in 2000-2001, it developed that there is a lot of maintenance time required for databases connected to RPA. We agreed that it would be more efficient to locate a separate server at TBLC. It also became evident that RPA would be needed to enable the Gaylord and Horizon sites to become unmediated for the patrons of these libraries.

At about the same time an unlimited user price structure was offered by *epixtech* for this software. We decided to purchase licensing and a server for RPA for any Alleycat participants that wished to implement authentication of locally owned databases and to enable unmediated borrowing in the four libraries where barriers to the use of the basic patron authentication that comes with the URSA software exist. We requested a project revision. This was granted and the RPA hardware and software were ordered in February. The Alleycat RPA server has been constructed. The software is being installed and RPA is expected to be operative in April 2002.

4. Further the implementation of remote authentication of customers for home and office access to on-line databases and the implementation of software that will forward requests for items not found in the region to OCLC for interlibrary loan processing - Remote Patron Authentication for commercial databases, OCLC interconnectivity and other external databases

Once the **RPA** software is operating for Alleycat unmediated authentication, the libraries that have had Alleycat patron authentication will be enabled to implement RPA for the commercial databases that they have purchased for offsite use by their patrons. Based upon the library card number, RPA will be able to direct searches to the appropriate databases under license by each library. This feature will be even more important once WebFeat translators become available within Alleycat advanced searching in 2002-2003.

Staff has been working with *epixtech* since early 2001 to implement of functionality of **OCLC as library of last resort** for the public, using a “hook” to OCLC via their Direct Request product. Numerous challenges have at last been overcome and a request has been sent from the live

Alleycat database to the live OCLC database. A major source of frustration has been resolution of messaging protocol incompatibilities between the URSA system and the OCLC system. Much like the links between the participating libraries and Alleycat this feature is dependent on disparate systems communicating well. We know that every time two disparate vendors have to work together, there are added challenges. We believe that epixtech is a leader in the field and better able to meet this politically difficult challenge than other vendors. It is also important to note that this capability to move requests from a local ILL system to OCLC is very new technology. TBLC and Solano County in California (part of the *NBCLS system*) are the first to use this URSA feature.

Within the next month we expect to bring this feature up live in the first LMS on Alleycat. SUNLINE was selected as the most challenging system and the one that TBLC staff could learn through most easily. This is because SUNLINE is the LMS managed by TBLC for 11 member libraries. Throughout the project, it has been a major advantage to have one of the most complex participants on site at TBLC. We have been able to learn volumes about the intricacies of the software first hand. It has made it much easier to train and support all of the participants. Implementation for the public of the OCLC feature in the other automation systems will continue until all have this functionality. This will also include enabling searches of 4 external databases and the TBLC Union List of Serials (located as a database on the Hillsborough County Public Library Cooperative server). The external databases are the Florida subset of OCLC's WorldCat, the State Library, CCLA and FCLA. Requests will be managed within the staff side of Alleycat and will travel to **OCLC, as library of last resort** after it is determined that the item is not available from an active Alleycat library. To the patron it will only be noticeable if they look for shelf status of items that are owned outside of Alleycat.

The TBLC **Union List of Serials** tape was received from OCLC in June 2001. It is currently being mounted on the Hillsborough County Public Library Cooperative server. Although the Union List of Serials will be searchable by all users of Alleycat only those authenticated in a library where the OCLC feature has been turned on will be able to place requests. As LMS's are connected to the OCLC feature increasing numbers of patrons will have this added functionality.

Electronic Resources

The strategy to **create a virtual library umbrella web site for use by the public** - The *Anywhere-Anytime Library* web portal is far broader than Alleycat. It is applicable to all aspects of virtual services for any and all TBLC member libraries. The cornerstone for virtual services is availability of **electronic resources**. The *Anywhere-Anytime Library* project has recognized this from the beginning and includes actively enabling and encouraging development of access to electronic resources by member libraries for the use of their patrons.

Librare, the ebook project, began its second year by adding two new library participants, bringing the total number of participating libraries to 34. Collection development is being accomplished by Selection Teams on a bi-monthly, subject specific schedule. The schedule is as follows:

<u>February</u>	<u>April</u>	<u>June</u>	<u>August</u>	<u>October</u>	<u>December</u>
Business	Social Science	Science & Health	Computer Science	History	Literature

The project calendar was originally planned to begin in October 2001, but was delayed due to instability at netLibrary. OCLC purchased netLibrary in January 2002. Once the final negotiations on the sale were finalized the Librare project calendar was established.

The Librare participating libraries met in January 2002 to allocate the final budget, determine the collection development process and calendar and establish plans for marketing the service to the public. Funds have been allocated to design and print a Librare bookmark.

Group purchase offers for electronic resources continue to be a priority for development of the content of the *Anywhere-Anytime Library*. Renewals for four products offered last year have been completed so far this year and two new products have been added. Details are provided in the following table.

Product	Participating Libraries
Today's Science <i>Renewal</i>	New Port Richey Public Library Safety Harbor Public Library Tampa-Hillsborough County Public Library
NoveList <i>renewal</i>	New Port Richey Public Library Largo Library Gulfport Public Library Palm Harbor Library Tarpon Springs Public Library Dunedin Public Library St. Petersburg Public Library
Grove Dictionary of Art & Grove Dictionary of Music and Musicians <i>new</i>	Ringling School of Art and Design Tarpon Springs Public Library Southeastern College University of South Florida University of Tampa St. Petersburg Public Library Tampa-Hillsborough County Public Library
Books in Print <i>renewal</i>	Tarpon Springs Public Library Palm Harbor Library Tampa-Hillsborough County Public Library
Ulrich's <i>renewal</i>	Tampa-Hillsborough County Public Library
Magill on Authors and Magill on Literature <i>new</i>	Tarpon Springs Public Library Seminole Community Library

For part of the year a Graduate Intern, Rachel Meyer, assisted Beth Watson, Assistant Director, in putting in place procedures for purchase offers. We see this as a service that enables the smallest library to benefit from pricing normally received only by larger libraries. Even after there is a core collection of material available online statewide, there will be more specialized databases that member libraries will want. This provides an opportunity to come together to obtain favorable leasing terms.

Public Awareness

The overwhelming success of Alleycat has been accomplished mainly via promotion by library staff and user word of mouth. During this grant period we plan to engage in more proactive efforts to increase public awareness. To this end an attractive 4-color bookmark has been created and produced. The first 10,000 were distributed by participating libraries so rapidly that a reorder of 90,000 was decided upon. Jim Scilligo, TBLC's marketing consultant, is working to set up a trial visit to a local large corporation during the lunch hour. We plan to go with a representative of the local library system and to take a display, the bookmark, the mascot in some form and a very short skit that introduces Alleycat to employees either in the informal cafeteria setting or an auditorium. We also promoted Alleycat in the Schools by attending a School Media Specialists meeting in Pinellas County and are pursuing one in Hillsborough County now.

Participant Input

The "decision makers" were invited to a meeting on February 1, 2002. The meeting drew 24 attendees from 15 current and future participating libraries. The Agenda, Participant List and Meeting Notes follow in the supplementary material.

SUMMARY

One concern that has not been expressed in this report is that the success of the virtual library causes strain on library staff and in some cases resources. While Alleycat opens up access to millions of titles and provides the library with a virtual staff member to handle many of the routine tasks, staff still needs to locate, pack and ship materials. Small libraries often have common titles on the shelf while they are circulating in their larger neighbors. This increases the use of their collections. In the long run the virtual library will need for the libraries to continue to have a reliable, low cost, fixed annual cost method of transporting materials. Florida Statewide Delivery is a behind the scenes part of the foundation for this project. State Aid for Public Libraries is another important building block. Adequate support for all types of libraries will help them to be viable resource sharing partners.

The Anywhere-Anytime Library Expansion Project for 2001-2002 is progressing nicely toward meeting its objectives for the year. Challenges are being met and resolved. The public is being served. Public expectations of resource availability have increased. This was brought home when a Pinellas County resident recently moved to eastern Polk County and discovered that unmediated interlibrary loan was not yet available to her. It was a tremendous effort to explain to her that rather than self initiated interlibrary loan being the standard all over the country, it is an innovation that is gradually being implemented in west central Florida as a pilot project. We are delighted that Remote Patron Authentication will soon make the technology transparent to those residents of the region who would otherwise believe that their local library is still in the dark ages. We look forward to many years of extended cooperation.