

IV. NARRATIVE

Introduction

This project addresses needs set forth in the Tampa Bay Library Consortium's (TBLC's) *Strategic Plan*. The plan, written in 1999, recognized the need for TBLC leadership in creating a regional virtual library. The project was first funded in 1999-2000 as an LSTA demonstration and pilot. Funding and development continued in 2000-2001. This report is on the third year of development of the Anywhere Anytime Library for west central Florida. During the first year a virtual catalog with interlibrary loan search capability and patron authentication for loaning (Alleycat) was implemented joining some TBLC member libraries. At the same time TBLC developed a methodology for database purchasing coordination and for collaboration in the introduction and purchasing of ebooks. The second year project expanded upon both of these aspects of a virtual library.

During the third year the Anywhere Anytime Library has been refined, expanded and enhanced. This report describes what is becoming a fully articulated virtual library program. The overall TBLC website has been completely redesigned to provide a portal to Alleycat and will soon bring all services under the umbrella Anywhere Anytime Library rubric with newly created branding.

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.

The third year activities have centered upon

- Expansion of Alleycat to include additional libraries and functionality
- Development of the Anywhere-Anytime Library as a web portal to access the virtual catalog and electronic resources
- Ongoing development of Librare and electronic resource group purchases
- Branding and marketing of all of the Anywhere-Anytime Library services

Today, through the Anywhere-Anytime Library:

- Residents of six west central Florida counties and students at four private academic institutions are able to use the virtual catalog from anywhere at anytime to search catalogs and request materials to be sent to their local library outlet. Visitors can also access and search the virtual catalog.
- Library users can access library-purchased electronic resources including full-image electronic books from home or office.

All of these invaluable resources are coming together to form the Anywhere-Anytime virtual library, a one-stop shop where residents of west central Florida can access the best the libraries in the region have to offer.

The Anywhere-Anytime Library is rapidly becoming a resource for all Floridians, during the year SWFLN, the library cooperative serving counties in southwestern Florida has made the Anywhere-Anytime Library its vehicle for providing virtual library services.

TBLC views this project as a demonstration and test site for virtual library services being developed for the Florida Virtual Library.

Developing a web presence

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 website will enable mounting of instructional and informational materials for staff on secure pages. The separate faces of the website 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.

In November 2001 a Webmaster was hired to develop the web presence. He came to TBLC from the private sector where he designed commercial websites for corporate clients. He brings unique talent and experience to the Anywhere-Anytime Library team. During the year he has developed new branded websites for TBLC and many of its programs and services. The branded program sites include Librare (www.tbtc.org/librare), the Alleycat project site (www.tbtc.org/aal) and Reciprocal Borrowing (www.tbtc.org/reciprocal). Each site has its own custom-designed look & feel, layout, color concept, navigation and logo recognition. Images of the sites are included in the supporting documentation.

The overall redesigned TBLC website (www.tbtc.org) debuted in August to critical acclaim. Anywhere-Anytime Library activities, including Alleycat and Librare, are now prominent features of the TBLC web page.

Work on the new TBLC website was a team effort. Every feature of the old TBLC site was reviewed to determine the appropriateness of keeping it on the new site. All new, updated content was developed for the site to represent TBLC programs and services. Each member of the TBLC staff was involved in writing content and being involved in organizational decisions about the pages developed to represent his/her responsibilities at TBLC.

Particular attention was paid to making TBLC programs and services that go directly to the end-user more prominent and user friendly. For example, the Library Finder is given a prominent place in the consistent buttons at the top of every page. The Library Finder is a link to the TBLC member library database where useful information about our member libraries is kept. A user can find:

- The hours and address of each library
- A link to the library's website and online catalog
- A list of the library staff with a link to email addresses
- Integrated access to the TBLC Language Bank where a user can find a librarian who reads/speaks/writes languages other than English. The languages in our Language Bank range from American Sign Language to Romanian.
- Soon the TBLC Special Collections Database will be integrated and users will be able to search for libraries housing special collections in a wide range of subjects.

Work is currently underway to create a portal Anywhere-Anytime Library site. The portal will bring together all of the components of the virtual library and provide the user with a single point of access for

web resources. The site will utilize the Anywhere-Anytime Library branding developed during 2001-2002.

Nurturing and growing Alleycat, the virtual catalog & interlibrary loan system

Alleycat (alleycat.tbhc.org), the virtual union catalog and interlibrary loan system, is the cornerstone of the Anywhere-Anytime Library. It began in 1999 by linking the catalogs of the first three TBLC member libraries and has grown to include 37 TBLC member libraries today. Alleycat uses epixtech's URSA software.

100% of the surveyed users of 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 de-duped title list of results is returned. This de-dupe process means the user sees one entry for the title that contains the holdings of all of the libraries who own that title.

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 "patron initiated 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 borrowing library.

Regional reciprocal borrowing arrangements within both TBLC and SWFLN and statewide ground delivery (for which TBLC is the statewide agent) are additional infrastructure that supports Alleycat. Because of reciprocal borrowing agreements most users can go outside their county to directly borrow materials located in the virtual catalog. The ground delivery service enables libraries to cost effectively transfer materials between libraries without concern for increased numbers of items being borrowed or loaned. The cost is paid at the beginning of the year and is unaffected by a sudden increase in the number of items sent.

The **37 TBLC member libraries** linked by Alleycat are in the table below. In this group, there are **10 separate library automation servers** connected and four vendor products are represented. Together the libraries provide **83 library outlets**. The total population directly served by these libraries is over **3.1 million Floridians**. Any library cardholder in these libraries plus the Seminole Community Library can initiate interlibrary loan requests in Alleycat. There are over **6.7 million items** represented in the virtual catalog.

Citrus County

Hillsborough County Library Cooperative

Tampa-Hillsborough Public Library
Burton Memorial Library
Temple Terrace Library

Palm Harbor Library

Including East Lake Community Library

Pasco County Library Cooperative

Pasco County Library System
Zephyrhills Public Library

Pinellas Park Public Library

Polk County Library Cooperative

Auburndale Public Library
Bartow Public Library
Dundee Public Library
Eagle Lake Public Library
Ft. Meade Public Library
Haines City Public Library
Lake Alfred Public Library
Lake Wales Public Library
Lakeland Public Library
Latt Maxcy Public Library
Mulberry Public Library
Polk City Public Library
Winter Haven Public Library

Sarasota County Library System

SunLine

Clearwater Christian College
Dunedin Public Library
Florida Southern College, Roux Library
Largo Library
New Port Richey Public Library
Oldsmar Public Library
Safety Harbor Public Library
Southeastern College Library
Tarpon Springs Public Library

SPIN

Gulf Beaches Public Library
Gulfport Public Library
St. Pete Beach Library
St. Petersburg Public Library

University of Tampa, Macdonald-Kelce Library

Southwest Florida Library Information Network Partnership

The Southwest Florida Library Information Network (SWFLN), the multi-type library cooperative serving the southwest Florida region, has partnered with TBLC to add some of their member libraries to the project. We have added five SWFLN member libraries to the Anywhere-Anytime Library. Work to bring their libraries into Alleycat occurred in 2001-2002. Service officially began on October 15, 2002. The following is a list of the SWFLN libraries and their automation vendors:

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Sanibel Public Library

TLC

Hendry County Public Library
Ft. Myers Beach Public Library
International College

DRA

Collier County Public
Library

Collier County Public Library has implemented the extended circulation feature while the remaining four have not. Extended circulation is the feature that enables the URSA software to interface directly with the

library automation system to place holds on items and create temporary records for borrowed materials. Extended circulation is a virtual interlibrary loan clerk.

Patron authentication for three libraries is through RPA, Remote Patron Authentication. (*RPA will be discussed in depth later.*) The other two are through the URSA software. One additional library system (Charlotte/Glades) remains to be profiled in December 2002.

This is a good beginning in testing the feasibility of expanding the system to incorporate libraries outside of the TBLC region to create a statewide system.

The addition of the SWFLN libraries brings the total of libraries participating in the project to **42 libraries** representing **15 library automation systems**, five vendor products, and providing **98 library outlets**. This brings the total population served to over **3.5 million Floridians in 10 counties** who are able to initiate interlibrary loan requests in Alleycat. There are over **7.7 million items** represented in the multi-regional virtual catalog.

Training and Support

The Anywhere-Anytime Library Team at TBLC provides for all of the training and support needs of the participating libraries. The average amount of support time spent per library is four hours per site for the year. The Team performed daily and weekly backups of the database to tape and stored the tapes at an offsite location. Monthly server maintenance tasks are performed.

A users group meeting is held twice yearly to discuss issues and update the participating library staff on new developments. 38 people attended the users' meeting held in August 2002. Pamela Burch from the Sarasota County Library System reported to the group on their experiences implementing the OCLC as library of last resort feature (*OCLC as library of last resort will be discussed in depth later.*) The second annual Alleycat awards were presented at this meeting. Minutes of the meeting and the awards presented can be found in the supporting documentation.

A decision makers' meeting was held on February 1 with 27 participants. All active participating library automation systems were represented. Minutes of the meeting are included in the supporting documentation.

In 2001-2002 training on basic operations centered on training staff at the newly implemented libraries: Citrus County Library System, the University of Tampa and the SWFLN libraries. Refresher training sessions were accomplished at New Port Richey Public Library and the Polk County Library Cooperative libraries. Extensive small group training was conducted for OCLC as library of last resort for interlibrary loan staff at Sarasota County Library System, Tampa-Hillsborough County Public Library and the SunLine libraries.

The Computer Based Training (CBT) course developed in the fall of 2000 was updated for training with the SWFLN libraries and a separate patron-training module was developed for use by the libraries with their patrons. The module is available on the project website at www.tbtc.org/aal.

To provide added assistance, a procedures manual was developed for the SWFLN training session. A copy was provided for each library. It contains a quick glance sheet for staff outlining the daily and monthly tasks to perform to keep requests flowing and the database clean. Detailed steps on how to

perform the tasks are included behind the quick glance sheet. The procedures manual also contains a master copy of the training manuals and status codes explanation and error procedures, which are given out during training. Each library also received a copy of the CBT CD-ROM to train additional staff and/or patrons.

The Once Upon an Alleycat training skit developed in 2001 continues to be used during training and library staff development days with great success. Karen Wilber and Lauren Stokes presented the skit at the paraprofessional annual conference in Pinellas County (VIP). It provides a general overview of Alleycat that is helpful 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 and the procedure manual is available on the project website <http://tblc.org/aal>

Staff training on the use of the URSA software was provided to 132 library staff members.

Location	Number of Students
University of Tampa	18
SWFLN	40
New Port Richey Public Library	2
Polk County Library Cooperative	24
Citrus County Public Library	24
OCLC link Training	
Sarasota	2
Tampa	4
SunLine	18

The intent of this project from its inception has been to develop a program that will be sustainable by the participants and replicable by other network organizations and cooperatives in the state and elsewhere. It has been our goal to extend a successful pilot to additional member libraries. At this time, the selected software meets our criteria and expectations.

From the outset, participating libraries have been committed to paying a portion of the maintenance fees for the URSA software. Grant funds have covered the installation and the first year of operation. In 2001-2002 the libraries were invoiced as follows:

System	Cost
SUNLINE	\$1,375
SPIN	\$1,375
Tampa Hillsborough	\$1,250
Pasco	\$1,250
Sarasota	\$1,250
Pinellas Park	\$1,000
Palm Harbor	\$750

Due to the availability of grant funds resulting from unexpended staff funding, any remainder of the monies paid by the libraries has been set aside to offset maintenance costs for the next year.

Revolutionizing interlibrary loan, Alleycat's impacts

Increased overall interlibrary loan activity and a shift from reliance upon a volume-based cost model using OCLC ILL to a fixed annual cost supplemented by the volume-based model are major impacts of Alleycat upon libraries.

Alleycat increases the amount of Interlibrary Loan the libraries handle. The impact can be documented both anecdotally and by comparing interlibrary loan statistics before and after implementation. Anecdotally, 90% of the libraries reported an increase in ILL volume. The other 10% reported that their volume has stayed the same. Statistically the number of filled requests in 2000-2001 was 14,865 and the number in 2001-2002 was 34,380.

The virtual interlibrary loan assistant that libraries with the extended circulation module rely upon manages much of the increased activity. This enables participants to change the fundamental way they manage interlibrary loan and to change their workflow to involve circulation staff.

Even though the volume has increased, staff and staff hours have not. The software is managing the flow of ILL much more efficiently. In many cases, workflow has been moved to circulation desks as staff download pick lists, find materials and check them out in the library automation system. Circulation staff also places material in orange delivery bags and receives returned material.

A second impact of this project for the libraries is the shift from a volume-based cost model to one that starts with a fixed annual maintenance cost and moves to the volume-based model only when materials are not provided by Alleycat libraries. Libraries traditionally did not promote interlibrary loan as a service because of fears regarding the cost to them for OCLC and delivery.

These fears would have been well founded using cost estimates made by the North Bay Library Cooperative in California regarding the loaded cost of an OCLC loan and the loaded cost of an URSA loan. Loaded cost includes staff time, vendor costs and delivery. In 2000 North Bay pegged this at \$26 per loan via OCLC and \$8 per loan using URSA. Using the 2000-2001 Alleycat statistics the results for the requests managed by URSA show the following differences in cost.

Library	Alleycat Filled Requests	OCLC COST \$26.00 PER REQUEST	URSA Cost \$8.00 per Request	Savings
SunLine				
Clearwater Christian College Library	103	\$2,678	\$824	\$1,854
Dunedin Public Library	260	\$6,760	\$2,080	\$4,680
Florida Southern College Library	48	\$1,248	\$384	\$864
Largo Library	705	\$18,330	\$5,640	\$12,690
New Port Richey Public Library	153	\$3,978	\$1,224	\$2,754
Oldsmar Public Library	200	\$5,200	\$1,600	\$3,600
Safety Harbor Public Library	322	\$8,372	\$2,576	\$5,796

Library	Alleycat Filled Requests	OCLC COST \$26.00 PER REQUEST	URSA Cost \$8.00 per Request	Savings
Southeastern College Library	11	\$286	\$88	\$198
Seminole Community Library	1185	\$30,810	\$9,480	\$21,330
Tarpon Springs Public Library	399	\$10,374	\$3,192	\$7,182
SunLine TOTAL	3386	\$88,036	\$27,088	\$60,948
Citrus County Public Library	2945	\$76,570	\$23,560	\$53,010
Palm Harbor Library	1251	\$32,526	\$10,008	\$22,518
Pasco County Library System	8762	\$227,812	\$70,096	\$157,716
Pinellas Park Public Library	2609	\$67,834	\$20,872	\$46,962
Polk County Library Cooperative	130	\$3,380	\$1,040	\$2,340
Auburndale Public Library	38	\$988	\$304	\$684
Bartow Public Library	51	\$1,326	\$408	\$918
Dundee Public Library	16	\$416	\$128	\$288
Eagle Lake Public Library	0	\$0	\$0	\$0
Ft. Meade Public Library	4	\$104	\$32	\$72
Haines City Public Library	0	\$0	\$0	\$0
Lake Alfred Public Library	7	\$182	\$56	\$126
Lake Wales Public Library	68	\$1,768	\$544	\$1,224
Lakeland Public Library	33	\$858	\$264	\$594
Latt Maxcy Public Library	24	\$624	\$192	\$432
Mulberry Public Library	5	\$130	\$40	\$90
Polk City Public Library	1	\$26	\$8	\$18
PCLC Key	17	\$442	\$136	\$306
Winter Haven Public Library	123	\$3,198	\$984	\$2,214
Polk County Library Cooperative Total	387	\$10,062	\$3,096	\$6,966
SPIN				
Gulf Beaches Public Library	205	\$5,330	\$1,640	\$3,690
Gulfport Public Library	742	\$19,292	\$5,936	\$13,356
St. Pete Beach Public Library	394	\$10,244	\$3,152	\$7,092
St. Petersburg Public Library	3241	\$84,266	\$25,928	\$58,338
SPIN KEY	17	\$442	\$136	\$306
SPIN Total	4599	\$119,574	\$36,792	\$82,782
Sarasota County Library System	2519	\$65,494	\$20,152	\$45,342
Tampa Hillsborough County Public Library	3278	\$85,228	\$26,224	\$59,004
GRAND TOTAL	34,380	\$893,880	\$275,040	\$618,840

OCLC reports for TBLC member library activity have not yet been received for the 2001-2002 year. The OCLC use in 2000-2001 for those libraries participating in Alleycat was steady from the previous years;

we believe that OCLC activity has continued to remain stable in Alleycat participating libraries in 2001 - 2002. This means that all of the costs described above would have been in addition to the amounts spent prior to implementation.

Building on a strong foundation, using additional software capabilities to grow Alleycat

The epixtech URSA software contains additional functionality that allows us to expand beyond the library catalogs. The additional URSA functionality tested in this year includes:

- Access to a union list of serials database and the ability to request copies of articles
- Connectivity to show holdings in extended library catalogs (libraries not fully implemented in Alleycat)
- Interconnection between Alleycat and OCLC interlibrary loan

Union List of Serials

The TBLC subset of the Florida Union List of Serials was identified as one of the extended databases to be made available on Alleycat during 2001-2002. The original plan was to partner with the Hillsborough County Public Library Cooperative (HCPLC) to host the TBLC Union List of Serials in their Dynix library management system.

We encountered some technical complications with using a Dynix system for this functionality. After reviewing the functionality in other automation systems it was determined a Horizon system could be used. Polk County Library Cooperative agreed to partner with TBLC to host the Union List of Serials. A Sybase license was purchased to provide access and work is under way to mount the database. The TBLC subset alone will enable anyone, from anywhere, at anytime to locate holdings information about periodicals owned in all TBLC member libraries. The TBLC subset includes 53,361 titles owned by 75 libraries and represents 63,629 holdings.

Once the database is fully functional it will be upgraded to include the statewide FLIN Union List of Serials. This will provide Anywhere-Anytime Library users with access to information about the periodical holdings of almost every library in the state of Florida.

When the Union List of Serials is available authenticated patrons will be able to place requests for materials. The connectivity with OCLC will make it possible for authenticated library cardholders of Alleycat libraries to request periodical articles directly.

Other library catalogs and OCLC

Libraries in west central Florida have relied on the OCLC database and its interlibrary loan management system for the provision of interlibrary loan for decades. The OCLC interlibrary loan system is a less than perfect means of fulfilling interlibrary loan requests for a number of reasons:

- No shelf status or lending information is displayed at the title level
- All interlibrary loan requests must be done by trained interlibrary loan staff
- The cost of processing interlibrary loans using OCLC has been calculated at approximately \$26 per request, this includes OCLC system charges, staff time and other variables

Alleycat has revolutionized interlibrary loan for libraries and the users of libraries in west central Florida by lowering the cost of borrowing, placing the ability to request things directly into the hands of the user and by displaying real-time shelf status and availability information. Alleycat libraries have continued to use OCLC to borrow materials not available in the library catalogs represented in the Alleycat virtual

catalog. Their use of OCLC has continued at the same pace as in pre-Alleycat years, resulting in a net increase in the volume of interlibrary loan business.

Establishing a link between Alleycat and the OCLC database was the ideal solution to begin to streamline interlibrary loan processes. The URSA software contains a component that can send requests to OCLC for fulfillment while managing the requesting in the URSA software. The interconnectivity was tested at Florida Southern College in March 2002. This feature, called OCLC as the library of last resort, was implemented for three Alleycat library systems, Sarasota County Library System (May), Tampa-Hillsborough County Public Library (June) and the SunLine libraries (August) during this project year.

As part of implementing OCLC as the library of last resort, additional library catalogs are now searched within Alleycat. Users receive results from the LINCC (Florida community colleges) and LUIS (state university system) databases and WorldCat (the OCLC database). Currently the same single search that returns results from Alleycat participants returns results from these three catalogs. Shelf information is not available for the extended catalogs. Searching the catalog for the State Library was also tested during the year. Due to variant indexing practices, it was decided to rely on WorldCat for the State Library collection. Users are able to view a de-duped list of titles found in all of the libraries' catalogs. Together these catalogs provide for the vast majority of items being sought. OCLC WorldCat provides access to not only other public libraries but also private academic and specialized collections around the world.

Alleycat users are now able to search the catalogs of all of the Alleycat participating libraries as well as the additional library catalogs and request materials from all of the sources seamlessly. The software routes the request into the OCLC database when it cannot be filled within the Alleycat system or when the item is only owned outside of Alleycat. Once the request is routed into OCLC it is matched to a record in the OCLC database, lenders are identified and the request is ready for a staff person to review and produce it.

The expansion of Alleycat to show the holdings in the extended library catalogs and to fulfill requests for materials outside of the Alleycat system has resulted in an increase in the number of requests being placed and the number of requests produced in the OCLC system. In the first three months of full production using the OCLC link in Alleycat the Sarasota County Library System produced 143 more requests than they had in the same three months in the previous year. In the first of those two months their OCLC ILL charges were lower than in the previous year. This can be attributed to the fact that the average OCLC charge per item requested is lower using the link from Alleycat than when done manually. To illustrate:

- The Sarasota County Library System implemented the OCLC link in Alleycat in May 2002.
- The average per request cost for June 2002 was \$1.85.
- The average per request cost for June 2001 was \$2.20.

The extended catalogs and interconnectivity with OCLC enables Alleycat to perform as a single system for ILL management for participating libraries and minimizes the amount of time staff spends on each request. For patrons it puts a complete interlibrary loan service directly into their hands.

Expanding the virtual library, adding online content

Alleycat is the foundation that the Anywhere-Anytime Library virtual library is built upon. The capabilities of the URSA software to add additional libraries and integrate other functionality make it an excellent vehicle for this development. Another important feature of URSA is its interoperability with

functionality provided by other software packages. This interoperability with other software packages brings the richness of remote patron authentication and connectivity to non Z39-50 resources to the virtual library. These features enable users of the Anywhere-Anytime Library to have access to a wide range of electronic resources from anywhere at anytime.

In this project year the online content available through the Anywhere-Anytime Library has expanded. The vehicles that make this expansion possible include:

- Remote Patron Authentication
- Group purchase of electronic resources for TBLC member libraries and Librarians
- WebFeat Translators

Remote Patron Authentication

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 online database. Vendors sell access to full text and other informational online 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.

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 provides residents with the full advantages of a virtual library.

As part of this year's project, TBLC purchased a server and an unlimited license for RPA in February 2002. Testing for database access using RPA was accomplished with the Polk County Library Cooperative libraries and has been implemented for many sites for interlibrary loan. Additional libraries are now being implemented for RPA for remote database access. This solution for remote access to licensed electronic resources has been implemented for Alleycat participating libraries, but can be used by any TBLC member.

Electronic Resource Group Purchases

TBLC works to facilitate the purchase of electronic resources for our member libraries. Group discount pricing for electronic resources is negotiated by TBLC, often in partnership with the Tampa-Hillsborough County Public Library, and is then offered to the TBLC membership.

The project continues to grow slowly. All of the products purchased in 00-01 were renewed and three new products were added:

- Grove Dictionary of Art and Grove Dictionary of Music & Musicians
- Sanborn Digital Maps of Florida
- Magill on Authors and Magill on Literature

This brings the total number of products offered to TBLC member libraries at group discount rates to eleven. Sixteen member libraries have taken advantage of one or more offers. The products and participating libraries are in the following table.

Product	Participating Libraries
Books in Print (booksinprint.com)	Palm Harbor Library Tampa-Hillsborough County Public Library Tarpon Springs Public Library
Facts.com	Eckerd College Largo Library New Port Richey Public Library Palm Harbor Library Safety Harbor Public Library Tampa-Hillsborough County Public Library Tarpon Springs Public Library Webber College
Grove Dictionary of Art	Ringling School of Art & Design St. Petersburg Public Library Tampa-Hillsborough County Public Library Tarpon Springs Public Library University of South Florida University of Tampa
Grove Dictionary of Music & Musicians	Southeastern College St. Petersburg Public Library Tampa-Hillsborough County Public Library Tarpon Springs Public Library University of South Florida
Magill on Authors	Seminole Community Library
Magill on Literature	Seminole Community Library Tarpon Springs Public Library
NoveList	Dunedin Public Library Gulfport Public Library Largo Library New Port Richey Public Library Palm Harbor Library St. Petersburg Public Library Tarpon Springs Public Library
Popular Science	Tampa-Hillsborough County Public Library
Sanborn Maps of Florida	Tampa-Hillsborough County Public Library
Science on File	New Port Richey Public Library Safety Harbor Public Library Tampa-Hillsborough County Public Library

Product	Participating Libraries
Ulrich's	Tampa-Hillsborough County Public Library

Librare

The most successful of the electronic resources projects is *Librare*. *Librare* is a collaborative collection development project that brings netLibrary e-books to library users in west central Florida. Thirty-one TBLC libraries participate in this project to share resources and work together to provide e-books to their users. The e-books in the *Librare* collection are full-text, full-image copies of printed works. They are available to authenticated, registered users 24/7 from anywhere at anytime. *Librare* brings digitized content to the Anywhere-Anytime Library. Begun in 2000 as a pilot project, the *Librare* group is currently planning for a year three and possibly a year four collection.

Based on the success of the year one *Librare* project all participating libraries were queried in October 2001 regarding their interest in participating in a second year's collection. All but two libraries opted to continue participation. An offer to participate in the year two collection was then extended to all TBLC member libraries. The offer included an option to "buy-back" into the year one collection. Three new libraries joined the project, taking advantage of the offer to participate in the year two collection and buy-back into year one's collection. These libraries are Florida Metropolitan University, St. Petersburg College and the University of Tampa.

The year 2 participating libraries are:

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

In late 2001 netLibrary filed for bankruptcy and was soon purchased by OCLC. Our group decided to table all purchases until the sale had been finalized. Due to this delay we began our year 2 collection

planning and collection development early in 2002. Participating libraries met in January 2002 to discuss collection development, marketing, budget and how to approach the year two collection.

The second year participant cost was \$2,000 per library. This was a decrease from the first year cost of \$3,000. It reflects the group's belief that we built a strong basic collection in the first year and could feel comfortable building on that with a reduced budget for e-books. From the total budget, 5% was set aside for marketing and publicity efforts.

Collection development continues with the same approach as in year one. Selection teams select in subject areas on a bi-monthly schedule. The addition of start-up, organizational conference calls at the beginning of each group's scheduled selection month jump-starts the selection process. The conference call is a time to discuss approach, the budget and to set parameters for the kinds of titles we request from netLibrary as possible purchases.

Since selection began in January 2002 a total of 252 e-books in the areas of business and social science have been added to the collection. This amounts to spending less than 1/3 of the collection development budget. The largest areas for acquisition—computer science and health are scheduled for selection later in the year. Participating libraries will continue selecting throughout 2003 as the project moves to a calendar year budget year.

Our year two marketing efforts focused on the development and printing of a promotional bookmark. The TBLC marketing consultant worked with a graphic designer to modify the year one Librare brochure and develop an eye-catching bookmark.

WebFeat Translators

All of the libraries linked in Alleycat are z39.50 compliant. This means that they all use a standards-based system for retrieval and display of results from their database. However, many valuable resources are not z39.50 compliant. These non-compliant resources include some library management systems, web resources and other online databases.

WebFeat translators provide a single search point to search multiple z39.50 and non-z39.50 databases at once. We planned to use these translators to provide simultaneous searching of four member libraries' library automation systems and a selection of useful free Internet resources in the upcoming year (2002-2003). However, we were able to purchase sixteen translators at the end of this project year. This provides us with a head start on the implementation of the translators.

Our ultimate goal is to make the databases searchable using the WebFeat translators part of the Alleycat search capabilities. An anticipated late 2002 upgrade to the URSA software, to be called iSelect, will incorporate databases using WebFeat translators and the z39.50 libraries databases currently in Alleycat into one search. By obtaining and profiling the WebFeat translators now, we expect to be able to move to the iSelect software shortly after it becomes available.

Pathfinders

To further expand the content available via the Anywhere-Anytime Library a project to add Pathfinders, a traditional in-house library resource, in a web format was begun. This project was done in conjunction with the "bibliographic records for free web resources" portion of the TBLC Bibliographic Enhancement grant project.

The plan for the “bibliographic records for free web resources” project was to identify good, content-rich free web resources and catalog them for inclusion in library management systems. This would bring the added content of links to web resources to the library’s catalog where patrons could find search results of the materials the library has on its shelves as well as the online resources the library recommends.

Five subject categories were identified for selection: Careers/Education/Teens; Financial and Business/Consumer Information/Genealogy; Government/Law; Medicine/Science; and Humanities. Approximately ten free web resources were identified in each subject category. The TBLC Webmaster is currently working on making these selected resources into electronic subject pathfinders for online users. The entry for each site will contain the title of the site, a link and an annotation.

Marketing the Anywhere-Anytime Library

TBLC continues to utilize the services of Marketing Consultant, Jim Scilligo to assist in bringing the Anywhere-Anytime Library to the attention of the public. His assignment during 2001-2002 included development and design of bookmarks for Alleycat and Librare, arrangements for Alleycat in the Community appearances and design of the umbrella Anywhere-Anytime Library logo. This logo became necessary when the SWFLN libraries decided that they wanted to market their project branded as the Anywhere-Anytime Library from the outset.

The new four-color bookmark style brochure for Alleycat proved to be popular. In all 90,000 copies were printed and most have been distributed. The Librare bookmark designed and paid for by the libraries participating in the project has also proven popular. 34,500 copies were printed and distributed. See the supporting documents for samples.

Alleycat in the Community

As part of Alleycat in the Community, the marketing consultant arranged for Lauren Stokes to speak with three community groups – Pinellas Economic Development, St. Pete Beach Chamber of Commerce and Tarpon Springs Rotary meetings. Sixty-two community leaders attended these sessions. Efforts to arrange for visits to individual companies were unsuccessful.

In addition, Karen Wilber presented Alleycat at the Pinellas County media specialist ~~in~~ service day in October and urged media specialists countywide to encourage students to use Alleycat by entering their public library card numbers and having materials delivered to the nearest public library. Since Pinellas County residents can get a library card at any library in the county, even Clearwater residents are using Alleycat, often with Largo library cards.

In the Library Community

TBLC has used participation in ALA discussion groups and the URSA users group to promote the project outside the region. Lauren Stokes participated in the URSA/RSS Users’ Meeting at the ALA Midwinter Conference in New Orleans. (Minutes from that meeting are included in the supporting documentation.) At the ALA Annual Conference in Atlanta she presented on the implementation of the OCLC interconnectivity at the URSA/RSS Users’ Meeting. We have actively participated in creating an enhancement list with other URSA/RSS customers. (See supporting documents – JAD Enhancement Priority List))

Lauren Stokes and Karen Wilber presented a poster session at the ALA Annual Conference in Atlanta to promote the accomplishments of Alleycat to the national library community. The poster session has become a valuable promotional tool. It was taken to the community group meetings and has been displayed in the Bartow Public Library and the Pinellas County Law Libraries. It will be on display at the TBLC Annual Meeting. A picture of the poster session is included in the supporting documentation.

Lauren Stokes published an article about the Anywhere-Anytime Library project in the April 2002 issue of *Florida Libraries*. This was the issue distributed to attendees of the Florida Library Association annual conference in Orlando. A copy of the article is included in the supporting documentation.

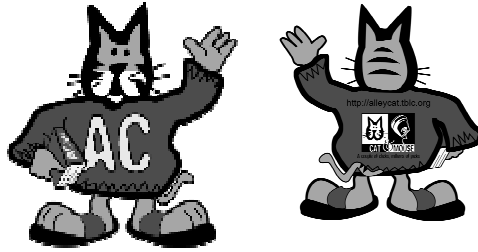
Branding

Design of the Anywhere-Anytime Library logo took the better part of three months. Jim Scilligo worked with graphic artist Debbie DiFrancesco of Creative Advantage to provide a selection of designs. The Alleycat users, TBLC Board, staff and members of TBLC and SWFLN provided comments and suggestions. The result is an icon depicting the Anywhere-Anytime nature of the project. It relates the project to Florida by inclusion of the strong sun and palm tree elements. The name element can stand alone or be used in conjunction with the pictorial icon. The “L” in Library is echoed in the hands of the clock.



SWFLN used this logo in all of its marketing materials relative to participation in Alleycat.

Logo recognition for Alleycat and the Anywhere-Anytime Library has been an important goal during this project year. The Webmaster designed the Alleycat logo as a branded character to be used as a site mascot. This mascot will be the logo used on shirts, mouse pads and stuffed cat toys to help promote the site to other libraries and to the general public.



Evaluating the Project

Objectives

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

1. Bring enhanced functionality to library participants (remote patron authentication and OCLC as the Library of Last Resort).
2. 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: Bring enhanced functionality to library participants (remote patron authentication and OCLC as the Library of Last Resort).

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. We have accomplished implementing this feature at three library systems – Sarasota County Library System, Tampa-Hillsborough County Public Library and SunLine. The remaining participants will be phased in over the next year as appropriate.

Remote Patron Authentication (RPA)

A server was purchased and the software implemented. Libraries, with the exception of the DRA and III sites, have been switched over to this authentication method. The DRA and III sites will continue to use the URSA authentication until their software vendor implements NCIP. Remote Patron Authentication is being phased in for database access. Polk County Library Cooperative is providing access to Gale’s Contemporary Authors and Auburndale is providing access to Electric Library, World Book Online and TumbleBook Library. Pinellas Public Library Cooperative libraries have implemented the St. Petersburg Times. Pinellas Park, Largo Library, Palm Harbor, Tarpon Springs, Southeastern College, and Safety Harbor have identified and submitted databases in which they wish to provide remote access.

Objective 2: Expand the regional virtual catalog and interlibrary loan system to include additional public library systems in the region.

We have demonstrated that it is possible to create a virtual catalog with interlibrary loan management and extended circulation features. 42 libraries are represented. They hold more than 7 million volumes. There are 2,109,096 registered library patrons who can use the interlibrary loan features of the west and west central Florida virtual library.

The following spreadsheet lists the current participating libraries, the number of registered patrons reported by each library, the number of volumes 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
Bruton Memorial Library	24,962	106,453	Hillsborough	30-May-00
Citrus County Library System	48,841	154,193	Citrus	22-Feb-02
Charlotte-Glades Library System	65,284	174,304	Charlotte-Glades	
Clearwater Christian College	984	92,491	Pinellas	30-May-00
Collier County Public Library	164,311	595,000	Collier	14-Oct-02
Dunedin Public Library	40,770	125,421	Pinellas	30-May-00
East Lake Community Library	4,677	24,410	Pinellas	30-May-00
Florida Southern College Library	3,606	155,301	Polk	30-May-00
Fort Myers Beach Public Library	13,114	75,000	Lee	14 Oct 02
Gulf Beaches Public Library	15,525	77,684	Pinellas	20-Feb-01
Gulfport Public Library	7,847	75,805	Pinellas	20-Feb-01
Hendry County Library System	20,640	90,104	Hendry	14-Oct-02
International College	1,200	23,900	Collier	14-Oct-02
Largo Library	80,561	226,565	Pinellas	30-May-00
New Port Richey Public Library	17,806	66,657	Pasco	30-May-00
Oldsmar Public Library	13,611	38,638	Pinellas	30-May-00
Palm Harbor Library	42,650	151,278	Pinellas	30-May-00
Pasco County Library System	188,941	559,548	Pasco	28-Aug-01
Pinellas Park Public Library	24,128	101,375	Pinellas	30-May-00
Polk County Library Cooperative Includes: Auburndale, Bartow, Mulberry, Dundee, Eagle Lake, Fort Meade, Haines City, Lake Alfred, Lake Wales, Lakeland, Latt Maxcy, Polk City, & Winter Haven	106,269	670,159	Polk	1-Dec-02
Safety Harbor Public Library	14,093	73,681	Pinellas	30-May-00
Sanibel Public Library	5,057	57,534	Lee	14-Oct-02

Library	Number of Registered Patrons	Number of Volumes	County	Date Available
Sarasota County Library System	253,061	753,555	Sarasota	30-May-00
Southeastern College Library	2,302	93,165	Polk	30-May-00
Seminole Community Library	34,425	65,259	Pinellas	30-May-00
St. Pete Beach Public Library	7,381	42,597	Pinellas	20-Feb-01
St. Petersburg Public Library	110,189	399,548	Pinellas	20-Feb-01
Tampa Hillsborough County Public Library System	704,711	2,195,596	Hillsborough	30-May-00
Tarpon Springs Library	22,761	96,633	Pinellas	30-May-00
Temple Terrace Public Library	55,800	79,343	Hillsborough	30-May-00
University of Tampa	3,800	275,000	Hillsborough	28-Oct-02
Zephyrhills Public Library	9,789	16,019	Pasco	28-Aug-01
GRAND TOTAL	2,109,096	7,732,216		

Outcomes

The two outcomes for this project are:

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

Public Use Technology

We identified three Indicators for this outcome:

- 1A. Increase in # and percentage of website hits; (25%)
- 1B. Increase in # and percentage of ILL requests; (15%)
- 1C. # and percentage of targeted populations seen in visits (10%)

The sources and methods for measurement were listed as:

- 1A. Counter on website (count recorded monthly)
- 1B. Reports from URSA software for # and % of ILL requests filled
- 1C. Reports from OCLC on # ILL requests filled
- 1D. email survey of patrons who have used Alleycat
- 1E. PR attendance records

The results of each measure are described in the following discussion of statistics.

Statistics

Website hits 100% increase

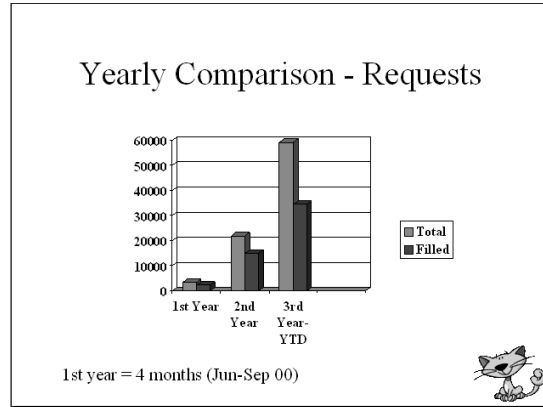
1A. Counter on website (count recorded monthly)

In the period from Oct 1, 2001 to September 30, 2002 the website had 117,260 hits recorded. This is over double the previous year number of 58,547 hits.

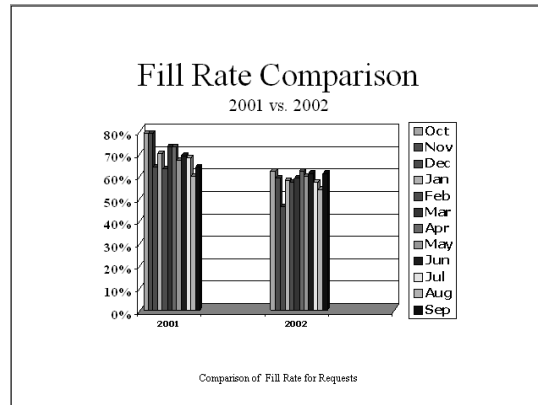
Interlibrary Loan Requests Filled 76% increase

1B. Reports from URSA software for # and % of ILL requests filled

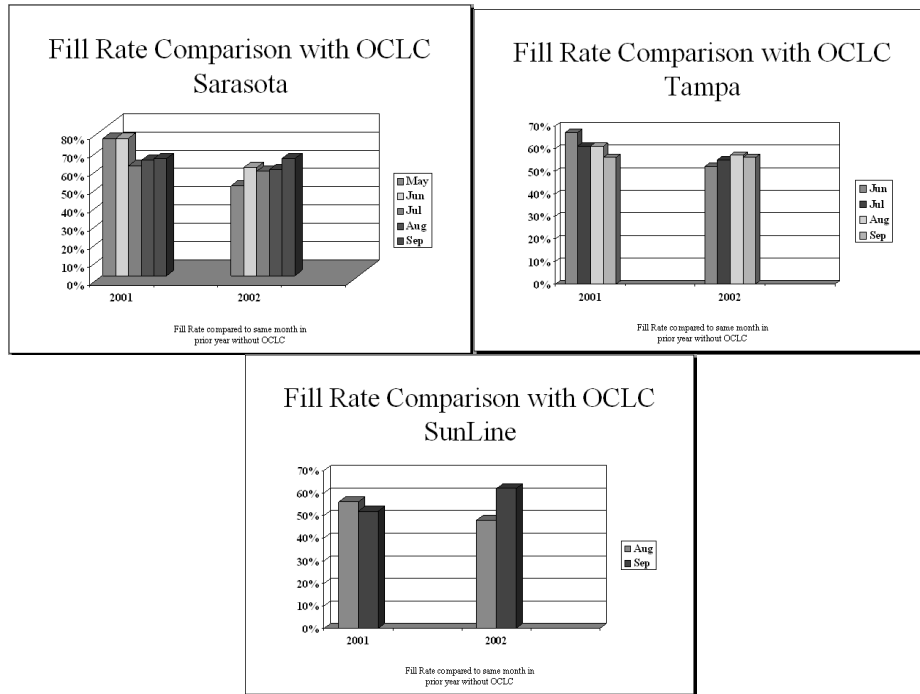
This chart graphically demonstrates the increase in total number of requests submitted. The number of filled requests totaled 34,380 out of a total of 59,147 requests made in Alleycat. This is a 2.3 times increase over the previous year filled requests of 14,865 out of 21,908 requests placed.



For this year the filled requests represents a 58% fill rate. This is down by 10% from the previous year. We cannot account for the lower fill rate. We expect the addition of OCLC as 'library of last resort' would improve the fill rate. In 2001-2002, we have added this feature to three library systems.



As the graphics below indicate implementation of the OCLC connection has not sufficiently increased the fill rate at those libraries. The fill rate for the libraries which have implemented the OCLC link appears to be increasing at the end of the grant year, which might be contributed to adding OCLC. The SunLine libraries showed a significant increase in the second month of using OCLC. August's fill rate was 48% and September's was 62%. We will need additional monitoring to determine if OCLC has an influence on the fill rate of requests.



1C. Reports from OCLC on # ILL requests filled

Statistical reports from the three systems that have implemented OCLC as Library of Last Resort indicate the requests forwarded by URSA under the OCLC product code 4506.

The following are the results by system showing the month when the functionality became operational:

	May	June	July	August	September	Total
Sarasota County	131	238	214	262	414	1,259
Tampa-Hillsborough	-	215	453	487	374	1,529
SunLine	-	-	-	114	116	230
TOTAL	131	453	667	863	904	3,018

1D. email survey of patrons who have used Alleycat

Surveys and Comments

Measurement of patron satisfaction was done once during Year Three of the project with an email survey. The survey was conducted at the beginning of September 2002. The survey asked the same questions as in Year Two. A staff survey was conducted at the Annual Alleycat Users' Meeting in August 2002. The same questions were asked as in the Year Two staff survey.

Patron Survey

Surveyed patrons were selected by locating patrons who had completed at least one request between the period of October 1, 2001 and August 31, 2002 and had included an email address in their request form. A list of email addresses was created and duplicate addresses were eliminated. The survey was created in an email message and the email addresses were pasted into the “Blind Copy” (BCC) mail heading so the patron’s privacy was protected. Patrons responded rapidly, with most responses being received within 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 were placed into an MS Excel spreadsheet and percentages were calculated. The spreadsheet of patron survey results follows.

Ease of use

95% of users indicated that requesting an item was either very easy or somewhat easy. This correlates with the results from March and September of 2001. We have been concerned that users would find Alleycat harder to use with the addition of the extended catalogs. Actually the same 4% found it “A little difficult” on all three surveys and no one indicate that it was “Very difficult.”

Wait time

The wait time is a concern and is probably indicative of increased volume of business and the availability of materials via OCLC. The trend is shown in the table below.

Time it took to receive an item	March 2001	September 2001	September 2002
More than 7 days	14%	24%	41%
5-7 days	38%	41%	34%
3-4 days	23%	31%	22%
1-2 days	8%	2%	1%
No Response to question	8%	8%	8%

Location of user

92% of users indicated that they use Alleycat from home or work. (80% of users indicated that they normally use Alleycat from home while 12% use it from work). This reflects a change from the first survey when only 53% used Alleycat from home. The following table shows the trends.

Location of user	March 2001	September 2001	September 2002
Home	53%	79%	80%
Work	25%	9%	12%
Library	22%	10%	7%
Other	0%	1%	0%
No Response to question	0%	1%	1%

How learned about service

43% indicated that they heard about Alleycat from library staff. The library staff as the major source of information about the service has been consistent on all surveys. The following table shows the combined results.

How users learned about Alleycat	March 2001	September 2001	September 2002
Library Staff	42%	37%	43%
Library Website	17%	25%	22%
Brochure	7%	13%	11%
Library Promotional	7%	7%	7%
Internet Search	11%	7%	4%
Newspaper or magazine article	3%	5%	1%
Local Community Meeting	0%	1%	1%
Other	12%	6%	10%
No Response to question	1%	1%	1%

Will you use this service again?

97% of users indicated they would use the service again. This is comparable to past survey results.

User satisfaction with the service

In September 2002, 90% of users responding indicated that they were delighted or satisfied with the service. This is similar to earlier results. When a person is less than satisfied, it is usually because the item requested was never received and they did not feel they received an adequate explanation of why it was unavailable. There is a feedback button on Alleycat and users are encouraged to communicate with the systems administrator. The traditional reasons for materials being unavailable continue into the virtual environment: items shown on the shelf are actually not there, materials are new and in demand at owning libraries, the material type is actually non-circulating.

Repeat users

Alleycat generates repeat users. On the latest survey 62% of users indicated they have used Alleycat 6 or more times, 25% indicated 3-5 times and 12% 1-2 times. In the earlier surveys 44% and 45% respectively indicated more than six uses, and 28% and 28% indicated 3-5 uses.

Age of users

This question was asked in September of both years. By far the largest user group (65% in 2001, 61% 2002) is between 41 and 65 years old. The next largest group is between 20 and 40 years old (23% in both years). Persons over age 65 represented 10% of users in 2001 and 11% in 2002. In 2002 3% were teens while no teens responded in 2001.

The survey results for the September 2002 survey are included in tabular and graphic form in 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.

1E. PR attendance records

We learned that this measure and its indicator were flawed in their construction. The indicator, “1C. # and percentage of targeted populations seen in visits (10%)” is unclear as to “targeted population”. Is this the members of the group visited? Is it the entire potential service population? Or is it something else? There were four visits, three of them to business organizations and one to a school district.

Participants learn to use technology

We identified one Indicator for this outcome:

2A. # of attendees at TBLC and library training sessions and percentage of staff of participating libraries

The number of people who attended training, meetings and staff development sessions provided the measurements for this output. A staff survey was conducted at the annual users’ meeting. The results are included below along with the previous year for comparison. The staff survey appears to be a better indicator of the success of the project in assisting staff to use technology than the number of training sessions. The training from the previous year paid off in the current year.

Training

69 hours of training were provided for 32 library staff members. Alleycat training was done on site using the URSA CBT, which was developed by Lauren Stokes and Beth Watson did OCLC training.

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. 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. 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 and at the annual paraprofessionals’ conference in May 2002.

Alleycat Meetings

TBLC hosted two meetings during Year Three of the project. One of the meetings was for “decision makers” and the other 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 have previously been referenced and are in the supporting documents.

Staff Survey

A library staff survey was conducted during the August 2002 Users’ Meeting. Thirty-two out of 38 attendees responded to a paper based survey. Answers to the first two questions regarding librarian use indicate the success of staff learning to use technology.

Request items for patrons?

	2001	2002
Frequently	27%	75%
Sometimes	68%	16%

Ease of use

	2001	2002
Very easy	50%	56%
Somewhat easy	32%	31%
A little difficult	18%	9%

The answers to the questions regarding change in interlibrary loan service reveal that more service is being provided and the great increase in demand had brought some increase in the amount of time respondents spend on interlibrary loan.

Change in number of requests

	2001	2002
Increase	68%	91%
About the same	18%	9%

Change in amount of time respondent spends on interlibrary loans

	2001	2002
Increase	41%	78%
Decrease	18%	3%
About the same	23%	16%

Change in use of OCLC

	2001	2002
Increase	36%	47%
Decrease	55%	25%
About the same	0%	19%
Never use OCLC	5%	3%

In 2002 59% of respondents reported calling TBLC for support within the previous six months. 44% said they received a response within 24 hours and the remaining 16% who answered indicated they received a response within 25-48 hours. Full results of the survey are in the supporting documents.

Alleycat Success and Challenges

In a complex, cutting-edge technology project such Alleycat both successes and challenges are anticipated. The following tables represent the overall successes and challenges of the project. Specific technology issues that have caused some connectivity problems and those that have delayed implementation of some or all features for a few libraries are described in more detail at the end of this section.

SUCSESSES	NOTES
Fostering of cooperation and promotion of resource-sharing	<ul style="list-style-type: none"> • 41 libraries connected • 3 out of 41 are academic libraries • Group purchasing of e-books and databases
Providing a much needed service to library patrons	<ul style="list-style-type: none"> • Loaning of materials including videos & audios • Patron initiated requests via the Internet • Well received by patrons • Patrons find it easy to use
Communication	<ul style="list-style-type: none"> • Created and distributed Cat & Mouse and Librar<i>e</i> brochures • Maintained project website http://tblc.org/aal; updated monthly • Provided frequent updates to libraries • Users' meetings • Decision makers' meetings
ILL impacts – faster, less cost, more efficient; redefined workflow	<ul style="list-style-type: none"> • Drastic reduction in OCLC use by smaller libraries • Finding items locally – within the virtual catalog participants • Receiving items significantly faster • Easier to package items for shipping (DLLI) instead of USPO • Significant & positive impact on library service • Redefining ILL workflow
TBLC support	<ul style="list-style-type: none"> • Helped libraries resolve workflow issues • Developed item identifier • Bulk purchasing of book labels, & brochures • Providing DLLI labels templates with addresses • Responding to feedback issues • Fostering cooperation among ILL staff
Elimination of paperwork trail	<ul style="list-style-type: none"> • Software tracks request through entire process • Completed requests kept for 60 days • Patron can review status of current requests at any time • Those libraries adding OCLC as “library of last resort” have one software management tool for all interlibrary loans
Training	<ul style="list-style-type: none"> • Re-training of library staff at some libraries • On-site for new library staff participants • Users' meeting – review of training procedures
Technology	<ul style="list-style-type: none"> • Getting the OCLC link to work; being the first in the country to use this feature was a success and a challenge.
Promotion by libraries	<ul style="list-style-type: none"> • Press releases • Mention at group talks such as home schooling parents, book discussion groups, library websites, OPAC computers • Patron training classes

SUCCESES	NOTES
Vendor cooperation	<ul style="list-style-type: none"> • Good working relationship with epixtech • On average 3 days per week contact with Ken Adams of epixtech support • Vendor receptive to changes in software

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

Support Challenges

Once the URSA software is operating for a library, support is needed for routine procedures. Most support issues involve a library being unable to ship or receive an item in the expected manner.

- Shipping problems are usually a result of the request being cancelled by the patron.
- Receiving issues are often due to barcodes not being accepted by the library’s automation system. This problem is most often seen at DRA sites. DRA sites need to run monthly cleanup on their databases to get rid of barcodes used when an item is borrowed from another library. The scripted deletion process does not perform the barcode deletion when there is a fine associated with the item. Staff have a tendency to forget to delete the holdings record when the fine is paid.

TBLC and the Hillsborough County Public Library Cooperative were required by their Internet vendors to change their IP addresses. This caused some firewall issues at those participating libraries that use a firewall. Two weeks notice was given but most libraries had to rely on the city or county IT departments to add the new IP address. Several failed to perform the task before the cut over date. This resulted in the connection being lost on the cut over day.

A major support area related to implementing OCLC as library of last resort in Sarasota. Several full days were spent in getting settings right and troubleshooting issues. This was the first implementation of this feature in production mode in the country and required all the skills of Sarasota, TBLC and epixtech staff to accomplish.

Several patron issues were addressed. In particular these involved patrons using AOL as their Internet provider and patrons with new computers using the Windows XP operating system.

- AOL uses a modified Netscape browser. This browser is missing some key components that are needed to successfully use Alleycat. Patrons were helped with downloading a new full functioning browser, enabling Java and then coached on how to use the 2nd browser with their AOL connections.
- Windows XP operating system includes Internet Explorer 6, which no longer has Java included. This was an issue with new machines. Patrons were assisted in obtaining Java from the Sun Microsystems website, installing it and enabling it so Alleycat would function correctly.

Epixtech support is very proactive in identifying problems when they occur. Ken Adams and Peter Fripp are constantly monitoring the URSA systems and receiving email notifications when scripts fail. Often they are fixing problems before the library even knows they have a problem.

Implementation Challenges

Polaris Customers

Since June 2001, we have been working with Gaylord to provide access and display of z39.50 holdings in the Polaris system. Connection has been established with the z39.50 server but there are holdings 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 Polaris customers.

Clearwater Public Library has been especially challenging. Currently, we can connect, search, display the BIB but no holdings information can display. This information is critical for request filtering. Request filtering is dependent upon knowing the status of the item and the item type of the material. Without holdings information patrons at other libraries can request any item, regardless of its shelf status and item type. Clearwater could receive requests for items checked out or reference material. In a small system this would not be a big problem but in a large system it could impact ILL staff drastically. On the borrowing side, Clearwater patrons would not be allowed to request items if owned by Clearwater regardless of its shelf status. We have discussed operating them in mediated mode without request filtering. The problem could be fixed if they could upgrade their automation system to version 2. It is compounded by the recent move to their city network. To upgrade to Polaris version 2 they need to turn on Active Directory on their Windows NT server. For security reasons, the city MIS department will not allow Active Directory to be turned on. They are investigating with Gaylord if it would be possible to patch their system without moving to a new version. If a patch cannot be made, then they will proceed without request filtering. It is hoped that when Gaylord has NCIP incorporated into Polaris, we will be able to add extended circulation. Clearwater continues to urge their vendor to become interoperable with

the Anywhere-Anytime Library software. Once Clearwater is successfully online, Heartland Public Library Cooperative (a Polaris site) will be added. They recently moved to version 2 of Polaris and should not encounter these issues.

SIRSI Customers

Hernando County Public Library moved to a Windows NT based SIRSI system after DRA was purchased by SIRSI. Unfortunately it was discovered in June 2002 that URSA software could not communicate with SIRSI using a Windows NT server. SIRSI mounted on a UNIX server can be connected. SIRSI is working on a solution for their Windows NT sites. No timeline has been provided by SIRSI for this fix. We will schedule their connection as soon as their automation system allows.

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. Horizon 8.0 will be the release, which will contain NCIP. This will allow the extended circulation and patron authentication functions. Epixtech has done Alpha testing on NCIP with an ExLibris system. They have successfully sent and received all NCIP messages required for URSA. Beta testing of NCIP for Horizon will begin in the first quarter of 2003. Both SunLine and Tampa Hillsborough plan to migrate to Horizon in 2003. Manatee County is expected to migrate to Horizon late in 2002 and will then be able to provide its customers with Alleycat directly. For now they can become reciprocal borrowers nearby and enjoy the advantages of participation as a reciprocal borrower if they are willing to pick materials up in Sarasota, Pinellas or Hillsborough counties.

OCLC as library of last resort

Alleycat and the Sarasota County Library System were the first production implementation of the connectivity (using the IPIG protocol) between an URSA system and OCLC. The North Bay Library Cooperative in California had tested the connectivity, but had not put it into full scale operation. This meant that we encountered a number of unexpected bugs at implementation. During May 2002 the Alleycat support staff at TBLC and the staff at Sarasota County worked closely together and with staff at OCLC and epixtech to make the link work correctly. The libraries implemented next (Tampa-Hillsborough and SunLine) were much smoother implementations because of all we learned with Sarasota.

The implementation of this feature requires a library to use custom holdings and Direct Request features at OCLC. Few libraries in Alleycat were using these OCLC features. Extensive one-on-one training and setup had to be done by the Alleycat support staff and the libraries' interlibrary loan staff to set up these features.

The IPIG protocol that enables the exchange of the interlibrary loan request between URSA and OCLC also provides for the exchange of messages to update the status of the request as it passes through the ILL management system. The portion of the protocol that exchanges the status messages has not been implemented in the URSA system. This means the library staff must update the request in both OCLC and Alleycat. Once the entire protocol has been implemented the library staff will update in one system and the other system will be updated electronically. This will further reduce the workload for processing interlibrary loan requests.

Extended Catalogs

There are several issues with the extended catalogs. The catalog for the State Library had serious z39.50 issues which would require the vendor DRA to solve. It was elected to not include this database in the catalogs to search. A Florida subset of WorldCat was not available so the entire WorldCat catalog is being used. WorldCat is a very large database and increases the time search results are returned to the screen. In addition, many records in OCLC will not de-dup for they lack an ISBN. To correct some of these errors, de-duping was changed to LCCN based, which has helped. WebLuis and CCLA z39.50 servers do not provide either ISBN or LCCN number so de-duping is not functioning for these catalogs. At least one of these databases is required in order to use the OCLC feature. We are closely watching the functionality of Alleycat with the extended catalogs. At some point, it may be necessary to move them into a separate extended search in order to keep Alleycat simple for most users. TBLC is anticipating participating in the OCLC test of the Oracle Florida subset of WorldCat. This could be a compromise solution as the primary extended catalog to search.

Union List of Serials

In testing the database it was discovered the Union List of Serials would over write all existing serial records in the HCPLC Dynix database if it were loaded directly on the HCPLC server. The recommendation from the vendor was to create a secondary primary agency on the server. This was tested. It solved the issue of over writing the BIB records but a new problem emerged. Patron circulation in Alleycat could not occur since the new primary agency did not have access to the HCPLC patron database. It was not possible to tie the patron database to the second primary agency.

Conclusions

During this project year the Anywhere-Anytime Library has grown to become a true virtual library for library users in west central Florida. Building on the strong foundation of Alleycat, we have grown the virtual library to include:

- Additional library catalogs in southwest Florida, the community college libraries and State University System libraries catalogs and the global OCLC WorldCat database,
- Expanded interlibrary loan access to materials using OCLC,
- Remote patron authentication to licensed electronic resources, including ebooks.

The Anywhere-Anytime Library and its related services have been branded and marketed to library users in west central Florida and to the statewide and national library communities. Those marketing efforts have been enhanced by the development and design of new websites for TBLC and for the Anywhere-Anytime Library services.

This project has tested and implemented new, cutting-edge technology and electronic functionality. We have met challenges head-on. We are working to make the Anywhere-Anytime Library a one-stop shop where residents of west central Florida can access the best the libraries in the region have to offer. The TBLC Anywhere-Anytime Library demonstrates a viable model for the future Florida Virtual Library.

Supporting Documents List

Website Screen Shots

- TBLC
- Alleycat Project Site
- Librare
- Reciprocal Borrowing

Website News Release

Alleycat Decision Makers Meeting – February 1, 2002 (*green*)

Alleycat Users Meeting – July, 2002

- Second Annual Alleycat Awards

Database Purchase Offers (yellow)

Librare Bookmark and other documents

Cat & Mouse Bookmark

Pictures of ALA Poster Session

URSA/RSS Users Meetings and JAD Enhancement Priority List (*blue*)

Florida Libraries Alleycat Article (*yellow*)

Patron Survey

- Email survey

- Patron Survey Results – 2002 Table

- Graphic Results

- Alleycat Patron Survey Comments

Staff Survey, Results and Comments (*green*)

Samples of internal communications

Statistics

- Comparison 2000-2001/2001-2002 Graph

- Loan Statistics - Spreadsheet

- Request Statistics – Spreadsheet

Contracts

- Epixtech* for URSA