

LSTA OUTCOMES PLAN

Project Name Anywhere – Anytime Library Expansion

Library Tampa Bay Library Consortium

Project Summary / Program Purpose: Expand the pilot regional virtual catalog and interlibrary loan system to include all public library systems in the region. Bring together the rich resources of Tampa Bay libraries for access by anyone, at anytime, from anywhere, via the Internet. Enable customers of the participating libraries to request that needed materials be loaned for their use and delivered to their local library. Add remote authentication of customers for home and office access to on-line databases and implement 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 to the customer.

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	INDICATORS	SOURCES / METHODS
<ul style="list-style-type: none"> • TBLC Staff (FTE =1.2) • Staff of participating Libraries • SUN server (at Tampa Hillsborough) • Robust connectivity of the server to the Internet (provided by Tampa-Hillsborough) • Library connectivity to the World Wide Web • Contract with <i>epixtech</i> for URSA software and support • Fees paid by year 1 participants • Purchase of Crystal Report software 	<ul style="list-style-type: none"> • Provide customers with seamless access to materials not owned by local libraries • Use new software functionality to directly connect to OCLC interlibrary loan to provide access to materials not owned by local libraries giving customers greater depth of access • Purchase FirstSearch access to facilitate use of new OCLC requesting functionality • Provide residents with access to the regional/state union list of serials • Train staff of participating libraries to use system, perform ILL functions, use on-line databases and to train the public • Encourage staff of libraries to train the public 	<ul style="list-style-type: none"> • # of times virtual library is used • # Requests for ILL materials filled • # Times ULS is used • # of library staff trained • # of libraries participating in virtual library 	<ul style="list-style-type: none"> • Public use technology to get information • Participants learn to use technology 	<ul style="list-style-type: none"> • Increase in # and percentage of website hits • Increase in # and percentage of ILL requests • Number of attendees at <i>epixtech</i>, TBLC and library training sessions and % of staff of participating libraries 	<ul style="list-style-type: none"> • Counter on website (count recorded monthly) • Reports from URSA software for # and % of ILL requests filled • Reports from OCLC on # ILL requests filled • Reports developed using Crystal Reports • On-line survey of patrons at website • Class attendance records • Project participant records

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	INDICATORS	SOURCES / METHODS
<ul style="list-style-type: none"> • Member library on-line database purchases • Union List of Serials offload from OCLC and server space at TBLC or Tampa-Hillsborough as a local database within an existing Dynix system • Access to OCLC's FirstSearch 	<ul style="list-style-type: none"> • Conduct a publicity program to increase awareness of the service • Provide software troubleshooting support to participating libraries • Train customers and staff to use system 				

INTRODUCTION

The Tampa Bay Library Consortium (TBLC) was founded in 1979 to enable libraries in west central Florida to share resources. TBLC was the first multitype cooperative in Florida and is currently the largest. TBLC's membership includes 92 libraries -- 6 community colleges, 3 State University System libraries, 25 private academic colleges and universities, 4 public school systems, 39 public, and 15 special libraries. Included in the public library member group are two countywide and one multi-county library cooperatives. The counties served by TBLC member libraries are Citrus, DeSoto, Hardee, Hernando, Highlands, Hillsborough, Manatee, Okeechobee, Pasco, Pinellas, Polk and Sarasota.

Through membership in TBLC, libraries in twelve counties serving over 3.8 million Floridians (approximately 30% of Florida's total population) have succeeded in creating a strong library automation infrastructure.

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

The staff of TBLC includes 3.5 FTE support positions and 6.5 FTE MLS positions for a total of 10 FTE's. Of these positions

- 3.0 FTE is devoted to the SUNLINE shared library automation system.
- 1.0 FTE serves to facilitate and manage the statewide Florida Library Network materials delivery system
- 1.2 FTE is devoted to the Anywhere-Anytime Library Project
- 1.5 FTE provides bibliographic services
- 1.0 FTE provides and manages continuing education programs, and the remaining
- 2.3 FTE provide all other TBLC services and perform management tasks.

In 1999-2000 TBLC has been implementing an LSTA funded prototype pilot project, the Anywhere-Anytime Library in 20 member libraries. This is a proposal to continue and expand the pilot testing of the Anywhere-Anytime Library for west central Florida. The Anywhere-Anytime Library project allows libraries with completely different automation systems to share resources and perform interlibrary loan operations as if they were one system. It will also enable TBLC member libraries to negotiate together for discounted pricing for identified priority on-line database purchases.

As a product of a 1999 strategic planning process TBLC members developed the following vision:

TBLC member libraries see a time when ALL the people of west central Florida will enjoy seamless access to the rich information resources of the region, the State and the world. TBLC will be the bridge connecting all types of libraries in a regional information network.

The 1999 Planning Team updated the mission of TBLC and produced the following statement:

The Tampa Bay Library Consortium (TBLC) is a membership driven consortium. It includes all types of libraries and leads and encourages collaboration, resource sharing, staff development, and innovations to insure that the people of west central Florida receive excellent, up-to-date library services and have access to the world of information.

Strategic Directions for the 21st Century: Strategic Plan for 2000-2002 is provided as Appendix 1. A listing of TBLC's services is included as Appendix 2 (Programs and Services Overview)

This project is directly related to, “*STRATEGIC DIRECTION I: Lead Members in Creating A Virtual Library and Establishing Open Access to the Region’s Resources*”

TBLC will facilitate creation of the Anywhere-Anytime Library for west central Florida. This will provide direct access via the World Wide Web to listings of materials owned by participating member libraries. Anyone, from Anywhere, at Anytime will be able to search catalogs; registered borrowers will have access to information databases and will be empowered to place requests on-line for delivery of materials to their local library.

The following rationale for this strategy is articulated in the plan:

RATIONALE: The development of a virtual library for the region is of primary interest to members. TBLC has been funded for an LSTA pilot project for 1999-2000 to create a virtual union catalog with patron centered interlibrary loan management capabilities as the first step. The defined vision for a virtual library includes patron initiated document delivery, and the continual upgrading and enhancing of technologies. Wider access to electronic resources through group purchases is paramount. Establishing partnerships that lead to a stronger financial base and increased availability of the region’s resources is essential to the success of the virtual library concept. In order for some smaller libraries to share their resources, an up-to-date integrated library automation system is a necessary step. TBLC should encourage and administer automated systems such as SUNLINE for the mutual benefit of the libraries.

NEED

This project addresses the needs of both residents and libraries according to the following outline:

The Present State

Residents Need

Residents Currently Have - Anarchy

Libraries Need

Libraries Currently Have - OCLC Interlibrary Loan

Proposed Route to Meeting Residents and Libraries Needs

Access To Information about Materials in Libraries in the Region

Virtual Union Catalog

Reciprocal Borrowing

Patron Authentication

Unmediated Interlibrary Loan

Access To Databases and Full Text Materials

Purchase Of Innovative Software for Remote Patron Authentication

Library Collaboration

Database Access to the Union List of Serials and FirstSearch

A Mechanism for Getting Materials from Other Libraries

Extended Circulation Capability

OCLC as Library of Last Resort

Florida Library Network Statewide Delivery System

Year 1 Prototype Pilot

Year 2 Expanded Pilot

The Future – Vision

How the Future Is Being Realized

The Present State

Residents Need

1. Access to information about materials in libraries in the region
2. Access to databases and full text materials
3. A mechanism for getting materials from other libraries

Residents Currently Have - Anarchy

Local library automation systems, which are used to manage public service functions such as circulation, and public access and web, based catalogs. The end-user can sometimes access the local library's interface via the World Wide Web. Sometimes residents can place a request for material owned by their home library and sometimes they are able to individually search holdings in nearby libraries using a standard protocol numbered by NISO as z39.50. When they have searched the catalog of another library and found needed material, there is no easy way to simply request that the material be sent to their home library. A few libraries have mounted e-mail request forms to enable a resident to ask their home library to borrow an item from another library for them. This borrowing process is called "interlibrary loan."

Libraries Need

1. Assistance to make interlibrary loan service easy and seamless for residents.
2. Fixed annual costs for a growing volume of interlibrary loan requests
3. To minimize the amount of staff time per interlibrary loan request managed

Libraries Currently Have - OCLC Interlibrary Loan

OCLC is a library organization that has brought together a worldwide union catalog of records of holdings of over 6,000 libraries. They sell electronic interlibrary loan services to member libraries. Costs include searching, producing the request and telecommunications. This is currently the primary method TBLC member libraries use to locate materials in other libraries. It does not adequately meet their needs because:

1. The cost of searching for material, sending the request and telecommunications is incremental. These charges alone can exceed \$2.00 for each item requested. If service is increased, the costs can rise dramatically.
2. Due to the cost and the inability to know the annual total in advance, libraries often limit interlibrary loan service
3. The requesting library has no way of knowing if the material is on the shelf, in circulation, or actually missing at the owning library
4. There is no connection to the library's circulation system or catalog. Time must be spent checking the status of requested material and performing circulation processes

As users become more aware of interlibrary loan and materials that are available, the volume of business for libraries grows. The current process for requesting materials on interlibrary loan is priced by volume. The total cost to a library increases for each title searched and each electronic request produced.

TBLC is the Group Agent for 18 of the libraries included in this project. The average cost of sending a request to OCLC for these libraries was \$2.01 in 1998 and \$1.95 in 1999. These libraries spent \$27,000 each year to initiate requests for interlibrary loans using OCLC. They were only able to request from libraries in the southeast. The larger countywide systems: Tampa Hillsborough, Pasco, Manatee and Sarasota, the private academic libraries and the St. Petersburg Public Library pay for these charges as part of their individual full membership in OCLC. Their costs are not included in the previous calculations.

TBLC member libraries find that they need more staff to mediate (manage) the entire interlibrary loan process. Nationwide it is estimated that the loaded cost of requesting an item via the widely used OCLC ILL Module is \$26.00. The costs and staff time needed are disincentives to libraries to market interlibrary loan services to residents. Libraries rarely publicize interlibrary loan service and residents lack access to materials in nearby libraries that they need for school, business or recreation.

Proposed Route to Meeting Residents and Libraries Needs

Access To Information about Materials in Libraries in the Region

Residents need to seamlessly find materials owned by libraries in the region and to request that these materials be delivered to their local library in a timely manner. Alternatively, if the item that is needed is on the shelf at a nearby library, the library user needs to be able to go directly to the owning library and borrow the material.

This project addresses solutions to meeting this need by providing for:

- Virtual Union Catalog
- Reciprocal Borrowing
- Patron Authentication
- Unmediated Interlibrary Loan

Virtual Union Catalog

Part of this project is to create a virtual union catalog. This will enable residents to search the holdings of all participating libraries by entering the author, title or subject once. Users will then be able to view results of an automated search of all of the libraries' catalogs. The results will show which library owns an item, if it is available, or circulating and when it is due back at the owning library. This will enable and encourage residents to locate the rich resources in Tampa Bay libraries seamlessly and easily.

Reciprocal Borrowing

Patrons can use this information to call a library to verify that the material is really on the shelf. When a library agrees to loan directly to patrons of another library they agree to engage in reciprocal borrowing. Once all participating libraries are part of a reciprocal borrowing agreement, patrons will be able to pick up the material *they* have located on the shelf at an Anywhere-Anytime Library.

At this time, residents of Hillsborough, Pinellas and Pasco counties participate in reciprocal borrowing coordinated by TBLC. Residents of Manatee and Sarasota counties began dual county reciprocal borrowing in 2000. The expectation is that within a year the TBLC coordinated reciprocal borrowing will expand to serve the residents of all libraries participating in the Anywhere-Anytime Library virtual catalog. Currently a TBLC committee is actively working toward this goal.

Patron Authentication

The Anywhere-Anytime Library is available via the World Wide Web. People who do not have library cards can use the virtual union catalog as visitors. People with library cards at participating libraries come into the system as "authenticated" patrons. The software verifies their library affiliation and standing at the beginning of a computer session. This is accomplished when a patron enters their library card number. This authentication/verification also determines if the person is a borrower in good standing at their home library and is eligible for interlibrary loan privileges.

Unmediated Interlibrary Loan

Imagine yourself at home, in the middle of the night, attempting to find information for a term paper, business report or simply to satisfy your curiosity. You turn on your computer. Access the Anywhere-Anytime Library and go to the catalog of library resources. You elect to look at all libraries at one time and enter the author, title or subject of the material you want. You select the item that appears to best meet your needs from the resulting list and up pops information about the only copy owned in the Tampa Bay area. It is 80 miles away and is shown to be on the shelf. You see a button that says “Request”. When you push that button you get a screen that asks where within your home library system you want to pickup the material. You select the branch near your office and send the request on its way.

Congratulations you have just initiated an interlibrary loan!

At this point your request has been unmediated. You have done all the work yourself.

Now the full importance of unmediated interlibrary loan comes into play. Your local library can decide to enable your request to go directly to the owning library. This saves staff time because no one needs to handle your request at this time. Your request can be on its way immediately and you need not wait for a staff member to enter your request in a separate system designed for interlibrary loans.

Your library will have to mediate the request (a staff member will resolve any problems) if it is for a periodical article or if the software has been set to mediate certain requests.

The item will be delivered to your library using a statewide pouch delivery service that picks up and delivers to all Anywhere-Anytime Library participants. When the material arrives, usually in less than a week, you will be notified that it is waiting for you.

URSA, the software selected for this project, will facilitate all of the above and more. The modules in the software package include:

- Virtual Union Catalog
- Patron Authentication
- Mediated and Unmediated Interlibrary Loan Processing

Access To Databases and Full Text Materials

Residents require access to on-line resources. They want that access to be from home or office as well as at the local library. Some of these on-line resources are vendor databases and others are library created or regional databases.

TBLC member libraries currently spend over \$ 1,000,000 for electronic resources. They feel confident that by working together they can either purchase shared access to databases or receive discounted group pricing. The expectation is that TBLC will broker purchases for selected databases, provide invoicing services and facilitate training in the use of some products. TBLC plans to coordinate discounted purchasing by bringing to member libraries offers negotiated by larger consortia such as SOLINET and by working with the State Library on any initiatives. Opportunities to be part of already negotiated discounts and to collaborate with other Florida resource sharing organizations such as CCLA, FCLA and the other 5 multitype library cooperatives will be welcomed.

This provides answers to meeting the need for database access and full text materials on-line by using:

Purchase of Innovative Software for Remote Patron Authentication
Library Collaboration
Database Access to the Union List of Serials and FirstSearch

Purchase of innovative software for 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 on-line database. Vendors sell access to full text and other informational on-line databases and require that the library limits 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. The remote patron authentication feature will be implemented for continuing libraries and new participants as a result of this grant.

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. Once this is in place and negotiated volume discounts have enabled TBLC member libraries to purchase increased access to on-line resources, residents will realize the full advantage of 7 day/24 hour library service and will be able to access a wide selection of full text and informational resources.

Library Collaboration

In 2000 a mechanism is being put into place for member libraries to preview and select electronic resources, and to negotiate volume or group discounts directly with vendors or to take advantage of discounts that have been negotiated by other agencies. Representatives of 13 TBLC member libraries of all types are working together on this project which will continue into the second year. The list of participants and the databases they are working with is included as an Input.

Database Access to the Union List of Serials and FirstSearch

As part of this project TBLC plans to mount the TBLC subset of the Union List of Serials (the combined listing of all magazines owned by cooperating libraries) as a local database. The TBLC subset includes 47,957 local data records in 76 cooperating libraries.

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

Use of the selected software as the search engine for the Union List of Serials has been successfully demonstrated in Maryland. Pat Wallace of the State Library of Maryland reports that they have mounted the statewide ULS on a separate SIRSI server and maintain it as a separate local database for use by everyone in the State.

This will provide a first test of mounting and offering locally provided databases as part of the pilot project.

As part of this project TBLC will contribute to the purchase of FirstSearch access for member public, private academic, school and special libraries.

This will be a needed component to enable use of Direct Request and OCLC interlibrary loan products by libraries that implement an OCLC feature called custom holdings. Our understanding is that OCLC as the library of last resort will best be accomplished in conjunction with implementing Direct Request and custom holdings. FirstSearch combined with remote patron authentication will enable residents to search beyond the regional virtual union catalog to find materials not owned by participating libraries and to place requests for these materials.

FirstSearch access is a necessary component to full Anywhere–Anytime Library functionality.

A Mechanism for Getting Materials from Other Libraries

The Anywhere-Anytime Library pilot project builds upon the library technology and materials transfer infrastructure already in place in TBLC’s service area. As noted previously, TBLC member libraries now have integrated library automation systems that can talk to each other – become interoperable - by utilizing standard protocols. Until now these systems have not been able to interact for the purpose of managing interlibrary loan activity.

When fully implemented the software selected for this pilot project will include two features, which will provide mechanisms for getting materials from other libraries. These features are:

- Extended Circulation Capability
- OCLC as Library of Last Resort

Extended circulation

This feature of the URSA software will provide each participating library with a virtual library assistant to process interlibrary loans. There is a considerable amount of behind the scene work that occurs when libraries loan materials to other libraries for the use of the public. This includes circulating the item to the borrowing library, checking the item into the borrowing library and creating a temporary record for it (to be used to track the loan to the client), managing the circulation of the item to the end-user and its return back to the owning library. The feature the vendor calls “extended circulation” automates the entire process. This feature alone will enable participating libraries to provide more and more efficient service to clients and to reduce the added demands on already stretched staff.

OCLC as Library of Last Resort

With the Anywhere-Anytime Library, participating libraries will be able to enable clients to place requests within the TBLC system without fear of running out of funding when the volume of business increases. By October 2000, the software vendor expects to be able to provide a connection to OCLC. This will be used to designate OCLC as “library of last resort.” When the this module is implemented, participating libraries will be able to mediate interlibrary loan requests for materials not located in the region. Libraries may also find that they can allow all requests to be unmediated. At this time member libraries in the region provide about 1/3 of all interlibrary loans requested by other TBLC member libraries via OCLC. In 1998-1999 TBLC member libraries borrowed 52,752 using OCLC, TBLC member libraries provided 14,876 of the items borrowed. At the same time TBLC member libraries reported borrowing 38,643 items without using the OCLC interlibrary loan mechanism.

This project is expected to increase the number of non-OCLC interlibrary loans and to stabilize the number being requested outside the region thus reducing or stabilizing OCLC expenses while dramatically increasing access for residents. Libraries in the project will only be able to supply a portion of the materials needed by clients. They will continue to need to turn to the larger worldwide resource-sharing source to more fully meet the needs of clients. In addition, this project will provide access to OCLC's FirstSearch. This includes WorldCat, the worldwide catalog of resources that is maintained by libraries at OCLC. Patron authenticated access to FirstSearch will enable residents to identify the full range of materials cataloged by libraries and appearing in WorldCat.

Florida Library Network Statewide Delivery System

The key to providing a mechanism for getting materials from other libraries is non-technical. It is physically moving the materials from Library A to Library B and back. The Florida Library Network Statewide Delivery System, which TBLC manages for 265 participating libraries statewide will enable libraries to send materials to each other without worries about the incremental costs of postage or package delivery services.

All of the libraries included in this project participate in the pouch delivery system that TBLC pioneered for the Distance Learning Library Initiative in 1998. In 2000-2001 the public libraries will be paying up to \$600 for the year for each day of service they receive each week. Most of the libraries that will be participating in the project now receive 5 day a week service. Next year it will cost them only \$ 3,000 for the entire year to send all materials to libraries in Florida, that can fit in the orange delivery bags. The delivery system participants account for over 95% of interlibrary loan activity in the state. Anywhere-Anytime Libraries will be able to send an unlimited number of items to any of the libraries in the project. This will enable participating libraries to know in advance the cost of transferring materials to requesting libraries and returning materials they have borrowed.

Year 1 Prototype Pilot

For 1999-2000, year one of the Anywhere-Anytime Library is funded by an LSTA grant in the amount of \$225,500. Matching funds and in kind services are being provided by TBLC and member libraries. The Tampa-Hillsborough County Public Library System has purchased the SUN server needed by the system and TBLC staff is spending about .5 FTE on implementation of the virtual union catalog. Three TBLC staff members will be trained as trainers and troubleshooters. Together they will assist the staff of the 20 libraries included in the prototype pilot project.

Participating libraries submitted configuration information in November and December 1999. A contract with the vendor, *epixtech*, was signed early in January 2000. The SUN server was delivered late in January. *epixtech* staff conducted their first implementation and installation visit early in February 2000. The project timetable established with the vendor set mid-March 2000 as the time when the virtual union catalog will become available for library staff training, staff use and testing. Formal vendor training is scheduled for early April. The goal is to be operational for library staff early in April and ready for use by the public toward the end of the month.

At that time, the virtual union catalog will be comprised of the catalogs of 20 libraries. Together they serve over 2 million residents and 5,874 FTE higher education students. The combined resources of the Year One participating libraries include 4,302,937 titles. The following table shows the Population Served and Collection Size for Year One Libraries.

Population Served and Collection Size for Year One Libraries

Library	Population Served or FTE Students	Collection Size/Shared Resources
Clearwater Christian College Library	580	103,449
Dunedin Public Library	35,700	98,446
Florida Southern College Library	2,300	171,721
Gulf Beaches Public Library	16,625	62,001
Gulfport Public Library	12,000	63,962
Largo Library	68,038	221,759
Manatee County Public Library	258,970	326,238
New Port Richey Public Library	Incl. in Pasco County	81,776
Oldsmar Public Library	11,732	32,433
Palm Harbor Library	65,000	137,206
Pasco County Library System	326,494	462,209
Pinellas Park Public Library	44,877	81,090
Safety Harbor Public Library	17,157	49,569
Sarasota County Public Library	315,917	667,907
Seminole Community Library	9,876	59,090
Southeastern College Library	1,100	97,578
St. Pete Beach Public Library	10,000	45,391
St. Petersburg Public Library	241,625	491,800
Tampa Hillsborough County Library	942,322	1,366,302
Tarpon Springs Public Library	20,161	73,840
20 Participating Libraries: TOTAL	2,006,261	4,302,937

These 20 libraries are served by 8 separate library automation systems and utilize 4 different products. The following list shows the libraries using each product and the two shared library automation systems (SUNLINE and SPIN) with the libraries they serve.

Year One Libraries and their Automation Systems

Dynix from *epixtech*

- Tampa Hillsborough County Library
- SUNLINE
Clearwater Christian College Library
Dunedin Public Library
Florida Southern College Library
Largo Library
New Port Richey Public Library
Oldsmar Public Library
Safety Harbor Public Library
Seminole Community Library
Southeastern College Library
Tarpon Springs Public Library
- Manatee County Public Library
- Pinellas Park Public Library

DRA Classic

- Pasco County Library System
- SPIN
St. Petersburg Public Library
Gulf Beaches Public Library
Gulfport Public Library
St. Pete Beach Public Library

Innovative Interfaces (III)

- Sarasota County Public Library

Horizon from *epixtech*

- Palm Harbor Library

During Year 1, TBLC and the participating libraries will be testing and demonstrating features of a product called URSA which is supported and supplied by *epixtech*. (*epixtech* is the name adopted by Ameritech Library Services in December 1999 when it separated from Ameritech.) With URSA, TBLC and the participating libraries are:

1. Establishing the virtual union catalog
2. Utilizing patron authentication to identify those people who as registered borrowers can directly place interlibrary loan requests
3. Implementing interlibrary loan management
4. Inaugurating extended circulation features of the software

At the same time TBLC members and the Anywhere-Anytime Library Year One participants, are:

1. Working to extend reciprocal borrowing,
2. Participating in TBLC brokered purchases of electronic resources and
3. Utilizing the statewide materials delivery system.

Year 2 Expanded Pilot

This proposal is to fund second year expansion of the prototype pilot project. The expansion is designed to:

1. Bring enhanced functionality to the initial participants (remote patron authentication and OCLC as the Library of Last Resort) and
2. Expand the regional virtual catalog and interlibrary loan system to include all remaining public library systems in the region.

This will bring together rich resources of Tampa Bay libraries for access by anyone, at anytime, from anywhere, via the Internet. It will enable customers of the participating libraries to request that needed materials be loaned for their use and delivered to their local library. This project brings the world of library materials to the customer.

This request for expansion of the virtual library system includes software, user site licenses, and customization of software, configuration of links between systems at participating institutions, and training for key staff at participating institutions. It provides for staff, selection of external commercial databases and marketing. It is planned to increase functionality for the 20 libraries participating in the first year project to include newly available enhanced patron authentication for database access and the link to OCLC as the library of last resort. This will then build upon the statewide investment in adding records to OCLC.

Because the interlibrary loan aspect is real time and patrons can see status on the shelf or in circulation of the items they need, it greatly enhances the ability of people needing information to get that information in a timely manner. The expansion will add five public library systems serving 18 libraries. These systems and libraries are:

DRA Classic

- Citrus County Library
- Hernando County Library

Polaris from Gaylord

- Clearwater Public Library

Galaxy from Gaylord

- Heartland Library Cooperative
 - Desoto
 - Hardee
 - Highlands
 - Okechobee

Horizon from *epixtech*

- Polk County Library Cooperative
 - Auburndale
 - Bartow
 - Dundee
 - Eagle Lake
 - Ft. Meade
 - Haines City
 - Lakeland
 - Latt-Maxcy
 - Mulberry
 - Polk City
 - Winter Haven

When the Year 2 libraries join the Anywhere-Anytime Library, the virtual union catalog will be comprised of the catalogs of 38 libraries. Together they serve over 3 million residents directly and 5,874 FTE higher education students. The combined resources of the Year One and Year Two participants are 5.8 million titles. The following table shows the Population Served and Collection Size for Year Two Library systems:

Population Served and Collection Size for Year Two Library Systems

Library System	Population Served	Collection Size
Polk	465,858	637,749
Citrus	112,424	137,579
Hernando	125,008	211,574
Heartland Includes: DeSoto, Hardee, Highlands and Okechobee	166,245	207,222
Clearwater	102,874	442,601
TOTAL	972,409	1,636,725

The project has been designed to be modular and flexible relative to the features each member library selects to implement. It can be expanded to academic, school, and special libraries in the region. In addition, it is possible to adopt this software on a statewide basis should this expanded pilot meet its promise.

At one time we had planned to include several academic libraries in the 2000-2001 project. After consideration of the amount of funding needed to accomplish this and looking at the automation status of the larger TBLC private academic libraries, it was decided to include only public libraries in this proposal.

A separate proposal is also being submitted by TBLC to expand SUNLINE, the library automation system administered by TBLC, to include small libraries. These small libraries can not otherwise cost effectively afford a sufficiently robust library automation system to participate in the Anywhere-Anytime Library. The cost to add them after they become part of SUNLINE will be included in a year 3 proposal.

The Polk County School District is submitting a separate LSTA proposal to develop the z39.50 infrastructure using its Follett system and to become part of the Anywhere-Anytime Library. *epixtech* staff met with the Polk school media staff when they visited in early February for the implementation meeting. They are very excited about the cooperation Follett is promising. The Anywhere-Anytime Library will welcome the addition of a school district to this demonstration project. . This would demonstrate feasibility to the three other TBLC member school districts and might generate similar proposals in year 3.

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. We continue to be open to testing other software solutions if the initial selection does not meet our expectations or appear to be developing the desired full functionality. At this time the selected software best meets the criteria set in making the selection and it promises to be able to meet our expectations. There is a web site for the project located at <http://www.tbtc.org/aal>. Regular updates and reports will be posted there.

The Future - Vision

Users of the **Anywhere - Anytime Library** will be able to perform a search in their home library's catalog, then choose to expand the search to any or all of the other participating libraries, without reentering the search criteria. They will need to learn only one search structure and one command set.

It will become possible for any verified client to initiate interlibrary loan requests. 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 effectively and quickly from owning library to borrowers library. Regional reciprocal borrowing arrangements and statewide ground delivery are additional infrastructure -- already in place, which support this improvement in rapid, cost effective library resource sharing.

TBLC member libraries see a time in the near future when a student, business person or adult lifelong learner can, on-line from anywhere at anytime:

1. search a virtual regional database of materials
2. be authenticated for remote on-line access to commercial databases
3. extend the search to supplemental vendor and local databases of articles and ephemeral materials
4. enter the search as subject, author, title, etc. and see holdings in all of the libraries in a group or the whole participant group at one time - regardless of the local automated system vendor
5. see the status of the material at that moment in all holding libraries
6. enter a request for the material to be sent to them at a convenient library

7. confidently expect that the material will arrive for their use in less than 48 hours
8. alternatively, pick up the item or use it at the owning library in the time it takes to drive there
9. return the material anywhere in the State and confidently expect that it will be returned to the owning library
10. expect that requests for items which are not available within the participant library group will be seamlessly forwarded outside the group

Marilyn Sheck, Chair of the TBLC 1999 Virtual Libraries Team described how a user might see this project once it is fully implemented:

A library customer is working on a book with a tight deadline. At 10:00 p.m. she reaches a point where she needs a specific type of information on railroad station architecture. She searches the Virtual Library web page for materials on the subject. She finds four full text articles on recent station renovation projects, which describe the architecture types of those projects. She also finds that there are two books on station architecture, one of which is out of print, available at local libraries in two adjoining counties and places holds on them. She then clicks on the electronic reference button and fills out a form asking for information on existing train stations in Florida and turns in for the night.

The next morning there is an e-mail response listing the Florida stations. That evening she visits the drive-through at her local branch library to pick up the books she had placed holds on the night before.

How the Future Is Being Realized

This vision of the future is being accomplished by implementation of gateway software running on a network server. The server is Internet accessible by guests from anywhere and full software functionality is available to users in good standing of participating libraries. The software utilizes mechanisms for system interoperability and provides user-friendly functionality to link library automation systems and information databases together.

This project builds on the testing of software being conducted in 1999-2000 and incorporates collaboration between the members of TBLC to realize the vision of access for all. The software enables seamless searching across vendor platforms and includes patron authentication and interlibrary loan management. The collaborative component entails selection of databases to license jointly or via group discounts and development of agreements on how costs will be shared for group purchases.

TBLC member libraries have joined a nationwide, small, but growing number, of collaborating libraries and systems using this revolutionary software. The product is called URSA. It has the power of *epixtech*, a premier library automation vendor, behind its development and maintenance. The entire State of Maryland, North Bay Library Cooperative in California, PALCI (a consortium of Pennsylvania academic libraries), and Borrow Direct (an alliance of Pennsylvania, Yale and Columbia University libraries) are also engaged in cutting edge projects utilizing this software.

The URSA software was selected in the spring of 1999. Member libraries knew that if the 1999-2000 LSTA grant proposal was funded, it would be necessary to have a running start in order to implement the project and begin to see results in time to have an impact on a second year proposal. The running start was furnished by issuing a letter requesting quotations from the three vendors identified as having possible software solutions. Responses to the request were reviewed, the TBLC Virtual Library Team evaluated the proposals and rated them using defined criteria. The URSA product was selected as by far

best meeting the project requirements. Appendix 3 includes the request for quotations and the vendor score sheet used by the 1999 Virtual Library Team.

This project will enable the public to use technology to get materials from remote libraries and information from on-line databases. The public and the staff of the libraries will learn to use technology. The Year Two Expansion project will enable all residents of TBLC's service region to have equal access by including public libraries in all counties served in the project. This expansion will eliminate many of the barriers that presently exist to having wide access to materials and information resources by residents of rural and urban communities *from anywhere, at anytime* via the World Wide Web.

INPUTS

TBLC Staff (FTE =1.2)

TBLC will contribute 1.2 FTE staff member to train and support Year 1 participants; implement the program with, train, and support the Year 2 participants; evaluate the pilot project and plan for year 3.

TBLC Staff assigned to the project are:

Lauren Stokes - Automation Services Support Coordinator

Lauren will be the lead technical person and will spend .5 FTE on this project. This is the same amount of time being allocated in year one. Her responsibilities have included vendor negotiations, interacting with and informing participants and working with Tampa-Hillsborough County library staff to set up and maintain the SUN server. They will also include training and technical evaluation.

Beth Watson - Assistant Director

Beth is the lead person for the electronic resources aspect of the pilot. Beth is working with an Electronic Resources Special Interest Group and a working group called the Electronic Resources Task Force. They have begun to identify desired resources and to work with vendors to arrange trials and to negotiate for discounted prices based upon volume.

All TBLC member libraries are included in the electronic resources initiative. Development of the regional or statewide Union List of Serials (ULS) as a locally mounted database will be part of Beth's responsibility. At this time Beth is the TBLC OCLC ULS expert.

Beth will also be trained as a trainer and back up support person. Beth will spend .4 FTE of her time on project related activities. This is commensurate with the time she is spending in 1999-2000.

Karen Wilber – Continuing Education Coordinator

Karen is the third member of the TBLC training team and will provide back-up support when Lauren and Beth are not available. She will also be included in the three person support triage team. This is expected to require .2 FTE of her time.

Diane Solomon – Executive Director

Diane will be responsible for overall coordination of the project. This is expected to require .1 FTE of her time.

The staff time needs described are consistent with the experience of North Bay Library Cooperative in CA as reported by the Director, Annette Milliron. North Bay is in the third year of a similar project using URSA for a virtual catalog and interlibrary loan system for 26 member libraries.

Staff of Participating Libraries

Participating libraries will be part of the governance of the virtual catalog segment of the project and will be expected to send staff for training. Staff will be trained upon implementation of the project and when new functionality is added. TBLC and participating libraries will conduct on going training for new staff. There will also be about four informational sessions each year.

Each library will have a designated contact person who will be included in an electronic distribution list. That person will be expected to communicate with senior management and line staff regarding the project. The larger library systems will have a designated "expert" who will be a trainer and be able to provide first level trouble shooting assistance. Libraries with only one outlet will turn to TBLC or the nearest library with an "expert". Experts can be expected to average 2-3 hours a week in support of the system. On average a participating multi-outlet library can expect to contribute 4 hours a week to this project and a single outlet can expect to require 1-2 hours. Additionally, the staff of the Tampa-

Hillsborough County Library System will be responsible for regular system data back ups and routine server maintenance. This backup and maintenance is expected to take an average of 1-2 hours a week of staff time.

With 12 multi outlet sites and 28 single outlet sites, the combined libraries will be contributing approximately 2.7 FTE each year for maintenance, training, troubleshooting and governance. The time estimated on the following chart is intended to be realistic, but not excessive. The assumption is that most staff will need less than one hour of formal training and that on average two people from each outlet will attend a two-hour, hands-on session.

**Participating Library Maintenance, Training, Troubleshooting and Governance
 Average Time Needed Each Week**

Library	Project Hours Per Week	Training Hours/Year
SUNLINE	Incl. in TBLC Staff Time	Incl. in TBLC Staff Time
Clearwater Christian College Library	2	2
Dunedin Public Library	2	4
Safety Harbor Public Library	2	4
Florida Southern College Library	2	4
Largo Library	2	6
New Port Richey Public Library	2	2
Oldsmar Public Library	2	2
Southeastern College Library	2	2
Seminole Community Library	2	4
Tarpon Springs Public Library	2	4
Manatee County Public Library	4	16
Palm Harbor Library - Incl. Eastlake	4	6
Pasco County Library System	4	16
Pinellas Park Public Library	2	4
Sarasota County Public Library	4	16
St. Petersburg Public Library	4	16
Gulf Beaches Public Library	2	2
Gulfport Public Library	2	2
St. Pete Beach Public Library	2	2
Tampa Hillsborough County Library – Incl. Plant City	6	50
Year Two Libraries		
Citrus County Library	4	6
Clearwater Public Library	4	4
Heartland Library Cooperative	4	2

Library	Project Hours Per Week	Training Hours/Year
Desoto	2	2
Okechobee	2	2
Highlands	2	6
Hardee	2	2
Hernando County Library	4	12
Polk County Library Cooperative	4	4
Latt-Maxy	2	2
Lakeland	2	6
Bartow	2	2
Auburndale	2	2
Ft. Meade	2	2
Haines City	2	2
Winter Haven	2	2
Eagle Lake	2	2
Dundee	2	2
Mulberry	2	2
Polk City	2	2
	104 per week = 5408 hours per year = 2.6 FTE	230 hours per year = .1 FTE

SUN Server (at Tampa -Hillsborough)

The system software leased via the grant is housed on a central SUN server owned and maintained by the Tampa – Hillsborough County Library System. It was purchased with a three-year warranty and the staff will perform troubleshooting and routine maintenance operations in collaboration with TBLC’s technical contact.

Robust connectivity of the server to the Internet (provided by Tampa-Hillsborough)

The SUN server is connected to the World Wide Web as part of the Tampa-Hillsborough backbone. Tampa-Hillsborough connects to the Internet with a T3 line.

Library connectivity to the World Wide Web

Each participating library system has a server that connects to the World Wide Web and all have implemented the z39.50 protocol.

Contract with epixtech for URSA Software and support

The existing contract with *epixtech* for URSA Software and support is contingent upon second year grant funding. It includes pricing based upon the size of the library (FTE for academics and circulation for public libraries). This pricing has been extrapolated in determining the costs for added functionality, annual licensing, training, and the addition of seven library automation systems. Added functionality includes patron authentication for remote access to purchased databases and the tie in to OCLC as the library of last resort using the Direct Request feature in FirstSearch.

Fees paid by year 1 participants

Year one participants will contribute to the maintenance and annual license charges at the following rates:

Small Libraries \$250

- Clearwater Christian College Library
- Florida Southern College Library
- Gulf Beaches Public Library
- Southeastern College Library
- Seminole Community Library
- St. Pete Beach Public Library
- New Port Richey Public Library
- Oldsmar Public Library

Medium Libraries \$ 500

- Dunedin Public Library
- Largo Library
- Palm Harbor Library
- Pinellas Park Public Library
- Safety Harbor Public Library
- Tarpon Springs Public Library

Large Libraries \$750

- Manatee County Public Library
- Pasco County Library System
- Sarasota County Public Library
- St. Petersburg Public Library
- Tampa Hillsborough County Library

In their first discussion of continuing cost sharing, the libraries decided to follow the pattern established by vendor pricing. They want to establish a baseline use pattern prior to discussing methods of cost sharing. They also want to see how much earned income is generated by consortia discount purchase value added services such as training, invoicing and negotiation for advantageous pricing.

California's North Bay Library Cooperative has established a formula that sets a flat rate of \$1,000 for each library and then credits each library \$2 for each loan and debits each library \$1 for each borrow. The funds realized pay most of the cost of the project and the cooperative contributes the remainder from member dues and grants.

Ideally, TBLC will generate sufficient income from the electronic resources portion of the pilot to subsidize this project. This would also be an appropriate way to spend increased member dues and/or increased Library Cooperative Grant Aid. In addition, by the beginning of year 3, if this is a successful pilot project, a statewide expansion would be feasible and could be funded as part of a new statewide "Access for All" initiative.

Purchase of Crystal Report Software

This grant proposal includes purchase of powerful reporting software, Crystal Reports. This is needed to go beyond the rudimentary reports included with the software package. The existing reports simply indicate the number of items loaned by each library to each other library, the number of items borrowed by each library from each other library and the average response time in each case.

Crystal Report provides presentation-quality reports in real time, using a web browser. It has the ability to create reports that look just like a web page, with hyperlinks to web sites, e-mail addresses or any type of file or URL. Most libraries want statistics on items requested for interlibrary loan. They use this information to develop their own collections. One library has expressed anxiety about losing this capability when they implement unmediated interlibrary loan. Purchase and use of this software will remedy this situation. The resulting reports can be distributed to member libraries via e-mail or over the

web in a variety of formats. An inexpensive CD-ROM training program is available for libraries who wish to learn how to generate reports and for TBLC staff to utilize.

Member library on-line database purchases

The members of an Electronic Resources Task Force are currently working with the top 14 vendors identified by member libraries in both a needs assessment and by prioritization by the Electronic Resources Special Interest Group. The members of the 2000 Electronic Resources Task Force represent all types and sizes of libraries served by TBLC. The Task Force members and their library are listed in the following table:

2000 Electronic Resources Task Force

Name	Library
Susan Miericke	Sarasota County Library System
Debbie Robinson	St. Petersburg Junior College
Gale Vaccaro	Pasco County Library System
Casey McPhee	Pasco County Library System
Sarah Johnson	Polk Community College
Ave Reagor	Hillsborough Community College
Kevin Beach	Manatee County Public Library
Helene Gold	Eckerd College
Carol DeBlieck	Pasco County School System
Janet Bergeron	Oldsmar Public Library
Andrew Breidenbaugh	Tampa Hillsborough County Library System
Tina Neville	University of South Florida, St. Petersburg
Pamela Burdett	Stetson University College of Law

The Task Force is working with the 14 priority vendors and has arranged for trials of the products shown in the following table:

Vendor Trials 2000

Vendor	Products	Month
Bell & Howell	ProQuest Discovery	January, 2000
Bell & Howell	ABI-Inform	January, 2000
Ebsco	EbscoHOST	January, 2000
SIRS Mandarin	SIRS Knowledge Source, SIRS Discoverer	February, 2000
Wilson	WilsonWeb	February, 2000
Facts On File	Facts.com	February, 2000
Institute for Scientific Information	ISI Basic Indexes	February, 2000
Congressional Information Service	CIS products vary by library type	February, 2000
Infonautics	Electric Library	March, 2000
Grove	Grove Dictionary of Art	March, 2000
Standard & Poor's	Net-Advantage	March, 2000
Bowker	Books in Print	March, 2000
Columbia University Press	Columbia Granger's World of Poetry	March, 2000
NewsBank	NewsBank NewsFile, Tampa Tribune and St. Petersburg Times full text	March, 2000
Silver Platter	MLA, PAIS, PsycInfo	March, 2000

It is expected that the trials and efforts of the task force will result in facilitated purchases of various databases. Libraries within the Anywhere-Anytime Library will be able to authenticate cardholders to use these resources from pc's anywhere at anytime. Other member libraries will need to use IP address or login/password authorizations.

Union List of Serials offload from OCLC and server space at TBLC or Tampa-Hillsborough as a local database within an existing Dynix system

This will integrate access to the regional Union List of Serials holdings into the Anywhere-Anytime Library as a locally mounted database and will demonstrate the feasibility and utility of readily available on-line access to the list. Also being explored is the possibility of mounting the entire Florida Library Information Network Union List of Serials. This could be accomplished if the State Library were to purchase the file and after mounting it on the State Library server, share the data file with TBLC. At this time TBLC is working with Susan Campbell to explore the feasibility of this offline OCLC product. The entire state list represents 264,244 holdings and would greatly enhance the information regarding materials available.

Access to OCLC's FirstSearch

The importance of access to WorldCat through FirstSearch has been discussed at length in the needs section. The State Library has indicated its intent to phase out LSTA funded FirstSearch access for public libraries, private academic libraries, schools and special libraries in the 2000-2001 fiscal year. TBLC member libraries in this category have come to rely upon the WorldCat access afforded by this project. Many will be unable to budget for it and look to TBLC to bring about economies of scale by providing a replacement. To replace the access being provided now by the State Library, FirstSearch is being included in this proposal and in TBLC's Bibliographic Enhancement Grant Proposal. TBLC serves roughly 1/3 of the population of the state. The annual cost of the State Library FirstSearch access is \$180,000. It is expected that TBLC can purchase the needed access for \$60,000, or 1/3 of the amount the State Library is spending in 1999-2000. One half of the needed funds are included in this proposal and the other half is included in TBLC's Bibliographic Enhancement Grant Proposal.

TBLC will add \$10,000 to \$20,000 in grant funding to purchase this essential access. Once connected and using the features of Phase 5 of implementation (OCLC as Library of Last Resort), the libraries will pay standard OCLC charges to borrow materials. Since this has been a component of interlibrary loan in the past, these costs have not been included as part of the match at this time. FirstSearch access in conjunction with Direct Request and Custom Holdings will enable any registered, authenticated borrower to use this feature from anywhere at anytime.

ACTION PLAN

Date	Activity	Responsibility
Now to May 2000	<p>Determine if tape of FLIN database will be possible</p> <p>Verify costs and arrangements if ULS is to be mounted as a local database</p> <p>A decision needs to be made by late April 2000 if the OCLC off-line electronic database is to be downloaded at the end of June on its regular schedule. A download off schedule would incur additional charges on a per library basis. This would add unnecessarily to the cost.</p> <p>Depending upon the added cost TBLC may be able to use a single down load which would do double duty with a download for the ULS project of three other MLC's.</p> <p>If a June 2000 download is used, then attempts will be made to have the database mounted by November 2000. If this is not possible, the goal will be August 2001</p>	<p>Assistant Director working with SOLINET/OCLC</p> <p>Automation Services Support Coordinator working with <i>epixtech</i>/URSA</p> <p>Executive Director working with State Library and MLC Directors</p>
Upon notification of grant award	<p>Revise proposal and budget as needed to meet requests of funding agency and/or revise as necessary</p> <p>Notify potential participants of award</p> <p>Determine final participant list based upon funding</p> <p>Negotiate addition of new participants with <i>epixtech</i>, URSA vendor</p> <p>Negotiate FirstSearch licensing with SOLINET/OCLC</p>	<p>Executive Director</p> <p>Assistant Director</p> <p>Automation Services Support Coordinator</p>
October 2000	<p>Sign agreement with vendor for additional participants and services</p> <p>Set timeline with participants and vendor for implementation of added features and addition of new participants</p> <p>Contract with SOLINET/OCLC for FirstSearch access, obtain new library authorizations and notify libraries of service</p> <p>FirstSearch available for in house use at all TBLC member libraries and anywhere, anytime for authenticated library card holders of AAL participating libraries</p> <p>Libraries begin to use FirstSearch for interim access to electronic ULS</p> <p>First year LSTA grant report is written and submitted</p>	<p>Executive Director</p> <p>Assistant Director</p> <p>Automation Services Support Coordinator</p>

Date	Activity	Responsibility
From notification to November 2000	Final agreements with year 2 participants are signed Configuration information is collected from year 2 participants	Automation Services Support Coordinator Library partners
October, 2000 – April, 2001	New Participants submit forms for configuration of URSA software Continuing participants provide information needed by <i>epixtech</i> to set up remote patron authentication OCLC connection <i>Epixtech</i> sets up software to add 18 new participants Remote patron authentication software is delivered and <i>epixtech</i> configures for use by all 38 libraries Software for OCLC as library of last resort is delivered and <i>epixtech</i> configures for use by all 38 libraries	Automation Services Support Coordinator <i>epixtech</i> Continuing Libraries (20) New Libraries (18)
August 2000- November 2000 or April 2001- August 2001	Arrangements are made with <i>epixtech</i> /URSA for mounting ULS as a local database	Assistant Director
January 2000	Expanded Virtual Catalog becomes operational	Automation Services Support Coordinator
October 2000 – September 2001	Continuing Library Training Library Experts and TBLC support/training staff (total 12) attend one day hands-on class at TBLC provided by <i>epixtech</i> on remote patron authentication and OCLC connection Library Experts and TBLC support/training staff schedule classes on new features for interlibrary loan and public service personnel in every library and every branch. Include refresher on Year One software. Minimum 30 sessions overall. Experts will be able to answer simple software questions and train staff on how to access the system and how to search and refine searches. Staff will be able to show people how to access the system and how to search and refine searches. They will be able to explain what the Anywhere-Anytime Library is to residents.	<i>Epixtech</i> Automation Services Support Coordinator Assistant Director Continuing Education Coordinator Library “Experts” (9 Staff trained in Year One by <i>epixtech</i> to be trainers and troubleshoot software problems) Each automation system will have one trainer except SUNLINE and Tampa-Hillsborough which will each have two to accommodate the large number of libraries/branches to be covered

Date	Activity	Responsibility
December 2000- September 2001	<p>New Library Training</p> <p>One session provided by <i>epixtech</i> staff will provide in depth training of one new Library “Expert” for each new system except Polk Cooperative. Two or three people will be trained as experts for Polk libraries.</p> <p>Library Experts and TBLC support/training staff schedule classes on all features for interlibrary loan and public service personnel in every library and every branch.</p> <p>Minimum 15 sessions overall.</p> <p>Experts will be able to answer simple software questions and train staff on how to access the system and how to search and refine searches.</p> <p>Staff will be able to show people how to access the system and how to search and refine searches. They will be able to explain what the Anywhere-Anytime Library is to residents.</p>	<p><i>Epixtech</i></p> <p>Automation Services Support Coordinator</p> <p>Assistant Director</p> <p>Continuing Education Coordinator</p> <p>Library “Experts”</p>
October 2000 – September 2001	<p>Answer questions and assist staff of libraries when they need help.</p> <p>Resolve problems and refer unresolved problems to <i>epixtech</i>.</p> <p>Provide other support provided to staff of participating libraries as requested</p>	<p>Automation Services Support Coordinator</p> <p>Assistant Director</p> <p>Continuing Education Coordinator</p> <p>Library “Experts”</p>
October 2000 – September 2001	<p>Troubleshoot and resolve problems with the SUN server.</p> <p>Troubleshoot and resolve problems with telecommunications</p> <p>Back systems up regularly and maintain the server</p>	<p>Automation Services Support Coordinator</p> <p>Tampa-Hillsborough Staff</p>
October 2000 – September 2001	<p>The project will be marketed to the public</p>	<p>Executive Director</p> <p>Assistant Director</p> <p>Library Partners</p>
October 2000 – September 2001	<p>Assist public in using the system</p> <p>Provide individual and group training as needed. Once the service is operating, the libraries will determine if scheduled classes are needed and will schedule them accordingly</p>	<p>Library Staff</p>
March 2001	<p>Midyear report written and submitted to State Library</p>	<p>Executive Director with input from staff and library partners</p>

Date	Activity	Responsibility
October 2000 – September 2001	<p>Continue process of selecting, testing and negotiating for commercial database access with a goal of completing work on purchasing of library selected databases from up to four vendors on the 1999-2000 list</p> <p>Libraries in the Anywhere-Anytime Library use remote patron authentication software to access TBLC brokered databases and databases they purchase singly.</p>	<p>Assistant Director Electronic Resources Task Force</p> <p>Member Libraries</p>
Oct. 2001	Write reports	Executive Director with input from staff and library partners

EVALUATION

The two major outcomes for this project are:

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

Output	Indicator	Sources/Methods	Outcome
Number of times the virtual library is used	Number of interlibrary loan requests filled	Reports from URSA software Reports from Crystal Report	Public use technology to get information
Number of library staff trained	Number of attendees at <i>epixtech</i> , TBLC and library training sessions and % of staff of participating libraries	Class attendance records	Participants learn to use technology

In addition, TBLC has developed measures of success for the strategies being implemented as part of the new strategic plan. Those measures, along with the related output, indicator and outcome are shown below.

The methods used to collect the indicators will be:

- 1) Statistical reports generated by the Anywhere-Anytime Library software,
- 2) Random sampling of satisfaction using an electronic survey which will ask clients:
 - a) If they received the material they requested in a timely manner
 - b) If they plan to use the service again
 - c) If they were satisfied with the service they received
 - d) To provide a comment on the service
- 3) Random sampling of library staff using an electronic or paper survey which will ask:
 - a) Is the software easy to use
 - b) Does the software relieve them of some previous tasks
 - c) Would they be able to provide the same level of customer service without the Anywhere-Anytime Library software

Strategy/Activities	Measures of Success	Output	Indicator	Outcome
Manage and expand a pilot project to provide a regional virtual catalog and interlibrary loan system	1999-2000 is established as the baseline for regional interlibrary loan activity. Increases for participating libraries are a minimum of 10% per year over each preceding year.	# requests processed by Anywhere-Anytime Library software	Increase in % of requests processed	Public use technology to get information and resources

Strategy/Activities	Measures of Success	Output	Indicator	Outcome
Facilitate addition of remaining public library systems, add private academic libraries, create linkages with public academic and school libraries	By October 2002 all counties served by TBLC member libraries have access to the full features of the Anywhere-Anytime Library	# and location of libraries using Anywhere-Anytime Library software	# of counties with libraries using the software	Public have access to technology to get information and resources
Implement software to electronically provide OCLC as library of last resort for the interlibrary loan aspect of the virtual library	Direct link to OCLC is in use by 50% of participating libraries by September 2001	# of libraries using URSA direct link to OCLC	50% of total Anywhere-Anytime Library participating libraries	Participants learn to use technology
Evaluate program and make needed adjustments	Establish a baseline of satisfaction by a random sampling of library staff and members of the public using the service regarding in 1999-2000. Increase level of satisfaction to 90% by September 2003.	# of staff and members of the public responding to random sampling	Baseline % of satisfaction is established in 1999-2000 an increases by 1/3 of the % needed to reach 90% by September 2003	Public are satisfied with access to technology to get information and resources Participants are satisfied with technology
Develop a comprehensive program of library purchased on-line resources and regionally licensed products	10 member libraries participate in group purchases by September 2001	# member libraries participating in group purchase program	# libraries and list of databases	Public use to technology to get information
Utilize an Electronic Resources Task Force to contact vendors, negotiate for products and arrange for trials	One shared site license or facilitated purchases for three products are in place by Jan 2001	# of shared site licenses # facilitated purchases for vendor products	# libraries and list of databases	Public use to technology to get information
Facilitate and provide services to support regionwide reciprocal borrowing program Participate appropriately in statewide planning and program expansion	Establish 1998-1999 as the baseline. 7,323 registered to use reciprocal borrowing 138,956 items borrowed	# counties with reciprocal borrowing agreements # people registered in libraries as reciprocal borrowers # reciprocal loans recorded	% increase in # of people registered % increase in # of reciprocal loans recorded	Public use to technology to get information and use that information to borrow materials directly from libraries

BUDGET NARRATIVE

SALARIES AND BENEFITS

TBLC Staff

As described on the Inputs Section of this proposal, TBLC staff will provide services as part of the match. Benefits are calculated as twenty-five percent of salary. The intent is for all except funds for Lauren’s salary to be part of the match. The following chart shows the TBLC staff salary and benefits breakdown.

TBLC Staff		Salary	Benefits @ 25%	Total
Diane Solomon	0.1	\$ 6,000	\$ 1,500	\$ 7,500
Lauren Stokes	0.5	\$ 20,000	\$ 5,000	\$ 25,000
Beth Watson	0.4	\$ 15,200	\$ 3,800	\$ 19,000
Karen Wilber	0.2	\$ 7,200	\$ 1,800	\$ 9,000
TOTAL	1.2	\$ 48,400	\$ 12,100	\$ 60,500

SUPPLIES

Purchase of Crystal Reports software and CD-ROM training software for Crystal Reports

TRAVEL

The travel budget includes \$500 for one trip by Lauren Stokes, Project Leader for Technology, to attend a 2-1/2-day grant implementation workshop in Tallahassee. Travel to the workshop in Tallahassee will be in accordance with Section 112.061, *Florida Statutes*. The travel budget also includes \$1,000 as match funds from TBLC for Lauren Stokes to attend ALA in San Francisco in 2001. She will include the URSA users meeting in her activities. This will enable Lauren to network with other URSA users, to discuss best practices with them, and to meet with users and the vendor to provide input into vendor planning for software enhancements.

OTHER

SUN Server Maintenance

A three-year on-site maintenance contract was included in the initial cost of the SUN server when it was purchased by Tampa-Hillsborough in January 2000. There are no maintenance costs anticipated at this time.

Telecommunications Infrastructure

The costs for telecommunications infrastructure are part of the connectivity costs of each participating institution and have not been broken out at this time as direct project costs. This acknowledges that there are telecommunications costs and indicate that they are not included in project costs.

Staff of Participating Libraries

Calculations for salaries of participating libraries assume that the average salary of people providing training, troubleshooting, support and liaison services at the participating libraries will be \$28,000 per year. Benefits were not included in this amount. All of these salaries will be part of the match. A staff time reporting form has been prepared for libraries to begin using in 1999-2000. This will be refined and used in 2000-2001 to document the time spent on the project. The full chart of anticipated participating libraries time is included in the inputs

section. Staff of all member libraries is expected to spend a total of 5,408 hours on project support duties and 208 hours in training. This is the equivalent of 2.7 FTE staff spread over 36 libraries. Assuming that the average salary is \$28,000 per year, this will provide \$75,896 as a match.

Software License and Maintenance

The contract with *epixtech* for second year software licensing and maintenance fees is contingent upon second year LSTA grant funding. The vendor includes six months of maintenance in the implementation costs. The second six months for new libraries is included in the total amount of \$ 66,560. For 2000-2001 the continuing libraries will pay a portion of the maintenance costs. This \$9,250 is included in the match. The contract with the vendor will be renegotiated for Year Three and we will look for a significant reduction in the continuing costs.

Phase 4 Implementation

Phase 4 of the original contract provides for interlibrary loan functionality for the Palm Harbor Library including the Eastlake Library, which is treated as a branch library. This was not implemented in Year One because Palm Harbor had just begun to install a Horizon system and was not ready for full implementation. The Palm Harbor catalog is part of the virtual union catalog in Year One. The \$9,000 amount purchases patron authentication, interlibrary loan (mediated and unmediated), extended circulation and remote patron authentication for Palm Harbor. This cost is included in the *epixtech* contract, which is contingent upon Year Two LSTA funding.

Phase 5 Functionality

Phase 5 as defined by *epixtech* is installation and implementation of OCLC as the Library of Last Resort for the seven library automation systems included in Year One. The \$46,000 cost is included in the *epixtech* contract, which is contingent upon Year Two LSTA funding.

New Libraries

The cost to provide all features of the Anywhere-Anytime Library to tie five additional public library automation systems into the project is \$163,750. This will serve 18 individual libraries. The list of libraries is included in the Inputs Section of this proposal. All functionality is included in this cost which has been calculated from the charges for the Year One libraries. The functionality is virtual union catalog, patron authentication, interlibrary loan (mediated and unmediated), extended circulation and remote patron authentication and OCLC as Library of Last Resort.

(A summary worksheet showing the Implementation Costs: Phases 4 and 5 for Year One libraries and all Phases for Year Two libraries follows the Budget Narrative and precedes the Budget form.)

Serials Union List Database

The \$ 4,000 cost of this portion of the project includes \$3,000 for the OCLC tape of the TBLC subset of the Florida Union List of Serials and \$1,000 for mounting it as a database within an existing Dynix library automation system at TBLC or Tampa-Hillsborough.

FirstSearch

To be able to fully utilize the connection to OCLC as Library of Last Resort, clients of public and private academic libraries will require access to OCLC's FirstSearch product. They will need this to access WorldCat. TBLC intends to provide for this access using the remote patron authentication feature. This feature enables library card holders in any public library in TBLC's service region to determine that items they need that are not owned by Anywhere-Anytime Libraries. Based upon existing State contracts and a calculation that TBLC

member public libraries serve 1/3 of the population of the state, we expect to spend \$60,000 for all the needed access. Since libraries not in this project will use a portion of this, the costs have been divided in half and \$30,000 is funded as part of this project. TBLC will match \$20,000 in LSTA funding with \$10,000 in member funding.

Electronic Database Purchases

The \$50,000 indicated here, as the cost of database access purchase TBLC will broker for member libraries is a very conservative amount. We expect that one or more general periodical database such as those provided by Gale/IAC, Ebsco or University Microfilms will be purchases. The cost of this alone will exceed \$50,000. In addition, Novelist, various Gale Group products and SIRS are likely to be purchased through TBLC brokering arrangements.

Marketing-Printing

During the project year we intend to print marketing materials of various sorts as part of a marketing campaign for the public. There will be 36 libraries participating and they serve over 3,000,000 people. At a minimum there will be a project bookmark, which will be provided in small quantities to all TBLC member libraries and in larger quantities to Anywhere-Anytime full user libraries. The sum of \$5,000 has been set aside for printing marketing materials. If funds are insufficient to cover quantities needed by participating libraries, they will be asked to order the number they need and cover additional printing costs.

BUDGET

(Round all amounts to nearest dollar. Add additional lines if needed to include all information in a section.)

		<u>LSTA</u>		<u>LOCAL/STATE MATCH</u>
SALARIES & BENEFITS (Position Title)	F.T.E.			
<u>Diane Solomon</u>	<u>0.1</u>	\$		\$ <u>7,500</u>
<u>Lauren Stokes</u>	<u>0.5</u>		20,000	<u>5,000</u>
<u>Beth Watson</u>	<u>0.4</u>			<u>19,000</u>
<u>Karen Wilber</u>	<u>0.2</u>			<u>9,000</u>
TOTAL SALARIES		\$	20,000	\$ <u>40,500</u>
CONTRACTUAL SERVICES (List each vendor)				
_____		\$		\$ _____
TOTAL CONTRACTUAL SERVICES		\$		<u> </u>
LIBRARY MATERIALS (Include type and numbers of materials to be purchased)				
_____		\$		\$ _____
TOTAL LIBRARY MATERIALS		\$		<u> </u>
SUPPLIES (List supplies needed)				
<u>Crystal Reports</u>		\$	500	\$ _____
TOTAL SUPPLIES		\$	500	<u> </u>
TRAVEL		\$	500	\$ <u>1,000</u>
EQUIPMENT (Equipment and furniture with a useful life of at least one year and a unit cost of \$1,000 or more)				
_____		\$		\$ _____
TOTAL EQUIPMENT		\$		<u> </u>
OTHER (Specify)				
<u>Staff of Participating Libraries</u>		\$		\$ <u>75,800</u>
<u>epixtech Software Licenses and Maintenance</u>		\$	57,310	\$ <u>9,250</u>
<u>epixtech Phase 4 Implementation</u>			9,000	<u> </u>
<u>epixtech Phase 5 Functionality</u>			46,000	<u> </u>
<u>epixtech New Libraries</u>			163,750	<u> </u>
<u>Serials Union List Database</u>			3,000	<u>1,000</u>
<u>FirstSearch</u>			20,000	<u>10,000</u>
<u>Electronic Database Purchases</u>				<u>50,000</u>
<u>Marketing-Printing</u>			2,500	<u>2,500</u>
TOTAL OTHER		\$	301,560	\$ <u>148,550</u>
TOTAL		\$	322,560	+ \$ <u>190,050</u> = \$ <u>512,610</u>