

Florida Department of State, Division of Library and Information Services

LSTA APPLICATION

Application Due: March 15, 2002

LIBRARY / ORGANIZATION NAME Tampa Bay Library Consortium

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FEID OR SAMAS AND EO # 59-24-10156

CONTRACTING AGENCY NAME Tampa Bay Library Consortium

TYPE (check one):

Public K-12 Academic Multitype Library Consortium Special State Library

CATEGORY (check one)

Access for Persons Having Difficulty Using Libraries

Library Technology Connectivity and Services

PROJECT NAME Growing the Virtual Library: Evolving the Anywhere-Anytime Library

PROJECT New Continuing If continuing, specify year: _____

LSTA FUNDS REQUESTED \$ 178,299.00

PRIORITY# 1 OF 3 APPLICATIONS SUBMITTED

LIBRARY SERVICE AREA POPULATION 3,800,000

NUMBER OF PERSONS TO BE SERVED BY PROJECT 3,800,000

TARGETED USER GROUP (Check all that apply)

Children Youth Adults Older Adults Mixed

Other, specify _____

Diane Solomon
Typed Name and Signature of Library / Organization Director

Date

NARRATIVE

Project Summary / Program Purpose: Bring together the rich resources of Tampa Bay libraries for access by anyone, at anytime, from anywhere, via the Internet. Maintain and enhance a virtual library umbrella web site for use by the public. Provide a regional virtual catalog and interlibrary loan system to include all public library systems in the region. Enable customers of the participating libraries to request that needed materials be loaned for their use and delivered to their local library. Expand the array of services available to include e-Reference. Work toward a goal of a full service 24/7 virtual library with shared resources for research and lifelong learning. This project brings the world of library materials and services directly to the customer – Anywhere-Anytime.

INTRODUCTION

The Tampa Bay Library Consortium, Inc. (TBLC) is a nonprofit multi-type library cooperative that assists and empowers libraries. All types of libraries, public, academic, school and specialized are members. Since 1979, TBLC has worked together with member libraries to provide better, faster service to the residents of west central Florida.

Today 93 libraries are members of TBLC. They include 6 community colleges, 3 State University System libraries, 25 private academic colleges and universities, 4 public school systems, 41 public and 14 special libraries. Together these libraries serve over 3.8 million Floridians (approximately 30% of Florida's total population) in 12 counties in west central Florida. The counties served are Citrus, DeSoto, Hardee, Hernando, Highlands, Hillsborough, Manatee, Okeechobee, Pasco, Pinellas, Polk and Sarasota.

TBLC Headquarters, located in Tampa, is the heart of the consortium. The staff is composed of 6 full-time MLS librarians and 5 FTE support and administrative staff. The organization is administered by an Executive Director and is governed by the 13 member TBLC Board of Directors. The Board of Directors is composed of elected representatives from member libraries. An annual budget of \$2.4 million enables the consortium to serve its members. In 2002, this budget represents \$83,000 in member dues, \$200,000 in state grants, \$716,000 in federal grants, \$476,000 in matching funds from members for federal grants, \$380,000 in fees for other paid services and \$525,000 for SUNLINE, a shared library management system administered by TBLC.

TBLC's mission is to lead and encourage collaboration, resource sharing, staff development, and innovations to insure that the people of west central Florida receive excellent, up-to-date library services and have access to the world of information.

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

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

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

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

The updated TBLC technology plan adopted by the Board of Directors on March 8, 2002 is entitled, *GROWING THE VIRTUAL LIBRARY: A TBLC Technology Action Plan For Managing The Evolution Of Anywhere-Anytime Service*.

This action plan reflects a common vision of the Consortium membership, namely, to consolidate resources and build on existing member and Consortium strengths and services. The purpose is to create a "library of the future" that is *of* the membership but something *beyond* them, with TBLC as both the visioning and managing agent for an enhanced virtual environment.

STATEMENT OF PURPOSE TO BUILD, SUSTAIN, AND TRANSFORM A
LIBRARY OF THE FUTURE IN WEST CENTRAL
FLORIDA.

Some of the relevant roles, strategies, and actions included in the plan are:

ROLE I: ACT AS A LEADER AND ADVOCATE FOR THE MEMBERSHIP

Strategy I-A: **Enhance delivery systems by developing and promoting
interconnectivity among libraries and systems .**

Action I-A.1 Expand the scope of *Anywhere-Anytime* service by extending the use of the *Alleycat* region-wide virtual catalog to all libraries within the TBLC service area.

Strategy I-B: **Build the library of the future as a "virtual space" to provide
Anywhere-Anytime access for the people of West Central Florida.**

Action I-B.1 Develop the *Anywhere-Anytime Library* into a Web portal for both on-site and remote access to information resources.

Action I-B.2 Establish and administer a real time virtual reference/chat service and plan to expand it to 24/7/365.

Action I-B.3 Expand public awareness of and interest in the virtual library by introducing *Anywhere-Anytime Library* services in presentations targeted to the business and high school communities.

Action I-B.4 Partner with selected groups and organizations to host Web-based services and digitized resources that will benefit the constituencies and clientele of member libraries.

Strategy I-C: **Promote the vision of the virtual library through regional, statewide, and marketplace advocacy.**

Action I-C.2 Formulate a marketing plan that promotes member libraries as "physical" portals in a comprehensive information system that is both physical and virtual in nature.

Strategy II-A: **Promote efficiencies by encouraging and coordinating enhancements to existing services offered to the membership.**

Action II-A.2 Expand the number and scope of pathfinders available electronically through the *Anywhere-Anytime Library*.

Action II-A.3 Coordinate group purchases and testing of databases and work toward regional purchases which can be accessed within the Anywhere-Anytime Library using a single search tool such as WebFeat.

NEED

1. Who is the targeted population?

The target population for this project is all of the people of the 12 counties in west central Florida served by TBLC. The project serves people of all ages, educational achievement and economic backgrounds. For marketing purposes the focus is people who are high school age and above. According to the 2000 census there are 3,770,388 residents of west central Florida.

The people of west central Florida live in widely diverse circumstances. Population density goes from 40 in Okeechobee County to 1,720 in Pinellas County (the most densely populated county in Florida). The region covers 10,937 square miles. It takes over four hours to drive from Arcadia in DeSoto County to Beverly Hills in Citrus County. A typical trip from North Tampa/southeastern Pasco County to Clearwater takes over 90 minutes.

The Polk City Library in Polk County serves 1,516 people and has 1,664 volumes. The Hillsborough County Library Cooperative with 26 outlets serves 998,948 people with a combined volume count of 2,292,953 volumes. Volumes per capita range from 10.38 at the Latt Maxcy Memorial Library which serves 2,975 people in Polk County and 5.20 in the Gulfport Public Library to 1.60 in St. Petersburg, 1.11 in Okeechobee County and 1.10 in Polk City. About 2 volumes per capita is the norm in the region.

The St. Petersburg Public Library is open 73 hours per week and Tampa-Hillsborough is open 69.5 hours per week while Polk City Municipal Library achieves 20 hours a week. The average for the region is 56 hours a week.

One library has a budget of \$17,325 for total operating expenses and .50 paraprofessional FTE staff while the largest system has an operating budget of over \$20,000,000 and 346.40 FTE.

Imagine the difference it will make when all 3.8 million people in the region have access to a librarian 24/7 or even from 2 p.m. to 11 p.m. daily! Imagine what it will mean to residents to have access to 7,745,135 volumes for interlibrary loan at the touch of a button from home, school or office. Imagine the impact of having full text of books (ebooks) and journal articles available 24/7. Think what it will be like for all of these people to have a person available to help them find the fact they want in this wealth of resources.

2. What are the unmet needs of the target population?

The biggest unmet need is that for *Access for All*, the State Plan, to be a reality, residents in the smallest, most rural, poorest communities must have the same level of service available to them as residents of the largest, most urban, wealthiest places. Technology is leveling the playing field for everyone.

The Anywhere-Anytime Library, a virtual library for west central Florida, brings the world of electronic resources together into one easy-to-use interface for library users. At its core is Alleycat, the regional union catalog and interlibrary loan utility.

The comments of borrowers regarding Alleycat say it all:

- I love Alleycat! **I can't wait for more libraries around the state to become involved.** I told my sister about Alleycat, but she lives in [a county that is not yet up], she was so disappointed. Keep up the good work! Thank you.
- **I love the ability to request books from other libraries; it increases books available to me without a financial strain on my own library.**
- I love this service and **have been very pleased with the greater selection that is possible through the many libraries!** The only thing I feel badly about, however, is the bit of extra work it seems to create for our local librarians at the check out counter. I've used this service many times and feel that it has saved our local library money since I rarely need to fill out a form to request the purchase of a book.
- **I really appreciate the service since my librarian's taste in books is somewhat different than mine and your service allows me to tap into other libraries and read what I want to read.** Thank you!
- I thought this was a fantastic idea! It was simple, and efficient. I love it and recommend it often.
- I was surprised and pleased with how quickly the book came to my local library.
- It is wonderful to use and saves time. With two boys to keep an eye on, I find it much easier to look for books and videos for our home schooling lessons on the computer in our home. **I love being able to request books at the touch of a button and having them sent to the nearest library for easy pickup.**
- Please be assured that this service has been a big blessing to our family and our local Reference Librarian who used to have to try and find most of these titles for me!
- So much easier to obtain materials & much faster than ILL. Big fan of Alleycat.
- The service is absolutely GREAT! **One can't really expect every library in town to stock the same items so it gives the library user a HUGE selection to choose from. I can get books from libraries that I would never travel to by car.**

Alleycat is only the beginning; this project will put a full range of virtual services within the reach of all residents.

3. Describe how the library or other community services do not meet the needs of the target population. This could include information on the library's inability to meet community demands or needs such as collection, staffing, resources, accessibility, etc.

As described above, the libraries in the region individually are open limited hours, some have few staff members and with limited funds they cannot select materials for all tastes in their community. In 1999, expenses for books ranged from \$2,290 in Dundee to \$2,998,762 for Hillsborough County. Statistics collected by the State Library indicate that in 1999 some individual libraries in Pinellas, Pasco, Polk, DeSoto, Hardee, Highlands and Okeechobee counties spent \$ 0 for electronic resources. These libraries do have access to some databases purchased by the public library cooperatives in their county. In the same year the Hillsborough County Library Cooperative spent \$578,585 for electronic resources. This illustrates the widely divergent availability of resources in the region.

4. How does the project relate to the library's mission, or to relevant long range plan goals?

In 1999 TBLC members articulated 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.

Programs and services are planned based upon input from member libraries. Current TBLC member services include Alleycat, the regional virtual catalog; continuing education for staff of member libraries; cataloging and other bibliographic services; SUNLINE, a shared library management system; OCLC interlibrary loan; group purchase of electronic resources; web hosting; and management of the statewide courier delivery service.

This project is a continuation and logical service expansion of the Anywhere-Anytime Library to integrate e-Reference with common online database resources to the project.

The original vision articulated in 1999 for what service would look like once the west central Florida virtual library was fully implemented is still valid today.

The Future - Vision

Users of the **Anywhere - Anytime Virtual Library** will be able to perform a search in their home library's catalog, and 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. This is called unmediated interlibrary loan. The user can locate needed items in participating libraries, see if they are theoretically available for checkout, and place holds on those items immediately. By enabling this direct, unmediated service, materials can move cost-effectively and quickly from owning library to borrower's 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, businessperson 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 it will find its way 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 Virtual Libraries Team in 1999, described how a user might see this project:

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.

Technological advances and patron service expectations have evolved since 1999 to necessitate enabling virtual library users to interact in real time with a librarian. The scope of resources and complexity of available materials now requires people who have specific reference needs to be able to ask a librarian interactively for assistance.

In the initial vision, the patron had to wait until the following morning for her answer regarding existing train stations. In an updated vision, she would correspond with a librarian and receive the needed information before retiring for the night.

Anywhere-Anytime Library Service is the ideal vehicle for all types of libraries to provide their clients with a consistently high level of service and wide array of resources. This project is designed to “Grow the Virtual Library” for west central Florida and to demonstrate how virtual services can work regionally with an eye towards statewide virtual services.

INPUTS

TBLC Staff (FTE =2.05)

TBLC will utilize 2.05 FTE staff members to

- Train and support Alleycat participants
- Implement and provide training and support for new features
- Develop, maintain and support the web portal
- Market to and train the public
- Manage the collaborative acquisitions of web resources
- Evaluate the project
- Plan and implement the WebFeat and e-Reference components and
- Plan for future enhancements

TBLC staff members work in teams. The Anywhere-Anytime Library Team for 2002-2003 will include:

Diane Solomon – Executive Director (0.1 FTE)

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

Beth Watson - Assistant Director (0.3 FTE)

Beth is the lead person for the electronic resources and OCLC interface aspect of the project. Beth works with the Electronic Resources Special Interest Group, Reference Special Interest Group and a working group called the Electronic Resources Task Force. Beth has been working with the Reference Task Force to plan for an e-Reference component for this project and the introduction of Web Feat translators to the advanced searching capability to Alleycat. She manages all vendor negotiations, product trials and acquisitions. In 2000 she facilitated the start-up of *Librare*, a shared collection of e-books. The descriptive brochure is included in the package. All TBLC member libraries are included in the electronic resources initiative.

As the primary liaison with OCLC and trainer on OCLC interlibrary loan, Beth is knowledgeable about all aspects of the Union List of Serials project and will supervise the training for OCLC Direct Request and its interoperability with Alleycat.

Beth is also a trainer and back up support person for Alleycat. Beth will spend .3 FTE of her time on project related activities.

Lauren Stokes - Technology Coordinator (0.4 FTE)

Lauren will be the project coordinator and lead technical person. She will spend .4 FTE on this project. Her responsibilities will include vendor negotiations, interacting with and informing participants, and working with Tampa-Hillsborough County library staff on the Union List of Serials portion of the project. She will also be responsible for the technical aspects of the WebFeat implementation. Lauren is responsible for training, orientation, some report and grant writing and technical evaluation.

Karen Wilber – Continuing Education Coordinator (.05 FTE)

Karen is a trainer and back up support person for Alleycat. She will spend .025 FTE of her time on project related activities.

Technical Assistant (0.15 FTE)

The SUNLINE Technical Assistant will mediate OCLC interlibrary loans generated by SUNLINE libraries using the OCLC link. Their time will be part of the match.

Webmaster (0.60 FTE)

The Webmaster is responsible for the design and maintenance of the web portal. He will also be a consultant for web site design and maintenance for TBLC member libraries and for web site work for bibliographic and continuing education activities. If demand for contract web site development requires his time, a revision will be requested to redirect some of the funding for this position to a temporary contract assistant.

e-Reference Support Staff (0.5-1.00)

This is a new position envisioned as the person who will provide training and support for the e-Reference project. This person will be hired at the point when the software has been selected and training and scheduling of staff begins. It is budgeted for the year as .5 FTE although the expectation is that this person will need to work full time for half of the year.

Staff of Participating Libraries

All aspects of this project are dependent upon member library staff. The libraries are picking up the burden of providing staff to pull materials off the shelves, pack, ship, and receive them. As the volume of business grows this takes additional staff time. These costs are not easily measured.

It is possible to measure staff time for participation in meetings. This includes members of the Special Interest Groups and Electronic Resources Task Force who attend meetings and work back at their home libraries. Librarians participate several times a year to plan and evaluate the program and to select new items to be added to the collection.

Participating libraries are part of the governance of the Alleycat segment of the project and will be expected to send staff for training. New staff will be trained and existing staff will receive refresher training as needed or when new functionality is added for their library. TBLC and participating libraries will conduct ongoing training for new staff. Line staff and upper management decision makers are each expected to meet once and twice respectively during the year.

Each library has a designated contact person who is the lead person for that library. They are included in an electronic distribution list and are expected to communicate with senior management and line staff regarding the project. Lauren Stokes will draw upon the expertise of the technical staff at Tampa-Hillsborough relating to Union List of Serials and Remote Patron Authentication aspects of the project.

Because participating library staff time is vital to this project we include the portion of their time which is calculable in Inputs. The following chart illustrates this point. However, no participating library staff time is included in the budget.

**Estimated Annual Time for Anywhere-Anytime Library Activities
 of Member Library Staff**

	# meetings	# hours each meeting including travel	# people	Average hourly loaded rate (25% benefits)	Total
Task Forces/SIG's	6	4	10	\$ 19.83	\$ 4,759.62
Librare Participants	Planning	1	4	20	\$ 1,586.54
	Training	1	4	15	\$ 1,189.90
	Selection Teams	Selection Time	# Selectors/ Team		
	6	4	7	\$ 19.83	\$ 6,663.46
Tasks	12	16	52	\$ 79.33	\$ 14,199.52

Alleycat Participants	# meetings	# hours each meeting including travel	# people	Average hourly loaded rate (25% benefits)	Total
SUNLINE					
Clearwater Christian College Library	1	4	1	\$ 19.83	\$ 79.33
Dunedin Public Library	3	4	2	\$ 19.83	\$ 475.96
Safety Harbor Public Library	2	4	1	\$ 19.83	\$ 158.65
Florida Southern College Library	1	4	1	\$ 19.83	\$ 79.33
Largo Library	3	4	1	\$ 19.83	\$ 237.98
New Port Richey Public Library	1	5	1	\$ 19.83	\$ 99.16
Oldsmar Public Library	2	4	1	\$ 19.83	\$ 158.65
Pinellas County Law Libraries	1	4	1	\$ 19.83	\$ 79.33
Southeastern College Library	2	4	1	\$ 19.83	\$ 158.65
Seminole Community Library	1	4	1	\$ 19.83	\$ 79.33
Tampa Technical Institute	1	3	1	\$ 19.83	\$ 59.50
Tarpon Springs Public Library	3	4	1	\$ 19.83	\$ 237.98
Palm Harbor Library - Incl. East Lake	3	4	1	\$ 19.83	\$ 237.98
Pasco County Library System - Incl. Zephyrhills	3	5	2	\$ 19.83	\$ 594.95
Pinellas Park Public Library	3	4	1	\$ 19.83	\$ 237.98
Sarasota County Public Library	3	5	1	\$ 19.83	\$ 297.48
St. Petersburg Public Library	3	4	1	\$ 19.83	\$ 237.98
Gulf Beaches Public Library	1	4	1	\$ 19.83	\$ 79.33
Gulfport Public Library	1	4	1	\$ 19.83	\$ 79.33
St. Pete Beach Public Library	1	4	1	\$ 19.83	\$ 79.33

Alleycat Participants	# meetings	# hours each meeting including travel	# people	Average hourly loaded rate (25% benefits)	Total
Tampa Hillsborough County Library – Incl. Plant City & Temple Terrace	3	4	2	\$ 19.83	\$ 475.96
Citrus County Library	3	6	1	\$ 19.83	\$ 356.97
Clearwater Public Library	3	4	1	\$ 19.83	\$ 237.98
Hernando County Library	3	5	1	\$ 19.83	\$ 297.48
Polk County Library Cooperative	3	4	1	\$ 19.83	\$ 237.98
Latt-Maxcy				\$ 19.83	\$ -
Lakeland	2	4	1	\$ 19.83	\$ 158.65
Bartow	2	4	1	\$ 19.83	\$ 158.65
Auburndale				\$ 19.83	\$ -
Ft. Meade				\$ 19.83	\$ -
Haines City				\$ 19.83	\$ -
Winter Haven				\$ 19.83	\$ -
Eagle Lake				\$ 19.83	\$ -
Dundee				\$ 19.83	\$ -
Mulberry				\$ 19.83	\$ -
Polk City				\$ 19.83	\$ -
Manatee County Public Library	3	4	1	\$ 19.83	\$ 237.98
Heartland Library Cooperative	3	6	1	\$ 19.83	\$ 356.97
DeSoto				\$ 19.83	\$ -
Okeechobee				\$ 19.83	\$ -
Highlands	1	3	1	\$ 19.83	\$ 59.50
Hardee	1	3	1	\$ 19.83	\$ 59.50
University of Tampa	3	4	1	\$ 19.83	\$ 237.98
Sub-Total Libraries	69	133	35		\$ 6,623.80

Advanced Search Libraries	# meetings	# hours each meeting including travel	# people	Average hourly loaded rate (25% benefits)	Total
Eckerd College	2	4	1	\$ 19.83	\$ 158.65
Florida Metropolitan University	2	4	1	\$ 19.83	\$ 158.65
St. Leo University	2	4	1	\$ 19.83	\$ 158.65
Stetson University College of Law	2	4	1	\$ 19.83	\$ 158.65
Sub-Total Advanced Search	\$ 8.00	\$ 16.00	\$ 4.00		\$ 634.62
TOTAL	89	165	91		\$ 21,457.93

Estimated Time For Volunteer Staff Providing e-Reference

Library	#hours per week	Total # Hours 6 months	Hourly Loaded Rate	Total
Bruton Memorial Library (Plant City)	2	52	\$ 19.23	\$ 1,000.00
Citrus County Library System	10	260	\$ 19.23	\$ 5,000.00
Eckerd College Library	2	52	\$ 19.23	\$ 1,000.00
Largo Library	5	130	\$ 19.23	\$ 2,500.00
Pasco County Library System	10	260	\$ 19.23	\$ 5,000.00
St. Petersburg Public Library	10	260	\$ 19.23	\$ 5,000.00
Safety Harbor Public Library	5	130	\$ 19.23	\$ 2,500.00
Sarasota County Library System	10	260	\$ 19.23	\$ 5,000.00
Southeastern College Library	1	26	\$ 19.23	\$ 500.00
Tarpon Springs Public Library	5	130	\$ 19.23	\$ 2,500.00
University of South Florida, St. Petersburg	5	130	\$ 19.23	\$ 2,500.00
University of South Florida, Tampa	5	130	\$ 19.23	\$ 2,500.00
University of Tampa Library	5	130	\$ 19.23	\$ 2,500.00
TOTAL	75	1,950		\$ 32,500.00

Estimated Training Time For Volunteer Staff Providing e-Reference

Library	Number of Staff Trained	# Total Hours of Training	Hourly Loaded Rate	Total
Bruton Memorial Library (Plant City)	1	10	\$ 19.23	\$ 192.31
Citrus County Library System	2	20	\$ 19.23	\$ 384.62
Eckerd College Library	1	10	\$ 19.23	\$ 192.31
Largo Library	2	20	\$ 19.23	\$ 384.62
Pasco County Library System	3	30	\$ 19.23	\$ 576.92
St. Petersburg Public Library	3	30	\$ 19.23	\$ 576.92
Safety Harbor Public Library	1	10	\$ 19.23	\$ 192.31
Sarasota County Library System	3	30	\$ 19.23	\$ 576.92
Southeastern College Library	1	10	\$ 19.23	\$ 192.31
Tarpon Springs Public Library	2	20	\$ 19.23	\$ 384.62
University of South Florida, St. Petersburg	1	10	\$ 19.23	\$ 192.31
University of South Florida, Tampa	1	10	\$ 19.23	\$ 192.31
University of Tampa Library	1	10	\$ 19.23	\$ 192.31
TOTAL	22	220		\$ 4,230.77

Equipment

SUN Server (at Tampa Bay Library Consortium)

The system software leased via the grant is housed on a central SUN server owned by the Tampa – Hillsborough County Library System and maintained by TBLC. It was purchased with a three-year warranty, which will have expired in 2002. TBLC staff will perform troubleshooting and routine maintenance operations and will provide for repairs. The server currently resides at TBLC. Due to the age of the server and potential growth in use a replacement server or upgrade

to this server may become necessary during the grant year. This would generate a project revision.

e-Reference Server

In order to install the software, a server will need to be purchased. The following specifications are based on recent quotes and current market conditions, which may change significantly by the time this service is implemented.

Server Specifications:

1 Processor (>800Mhz)
2Gb memory (1Gb / CPU)
4 18Gb hard drives (2 mirrored for the OS, 3 for a RAID5 & a hot spare)
1 100Mb NIC cards
Windows Operating System
Cost: Approx. \$3000

Robust connectivity of the server to the Internet (provided by TBLC)

The SUN server is connected to the World Wide Web as part of the TBLC backbone. TBLC connects to the Internet with a SuperT 3Mps service from Intermedia Communications. The upgrade from T1 service became necessary as the volume of activity on Alleycat grew in 2001. This high-speed service is possible in part due to e-rate discounts

Library connectivity to the World Wide Web

Each Alleycat participating library system has an automation server that connects to the World Wide Web and all have implemented the z39.50 protocol. The libraries to be added with WebFeat translators maintain web sites. The number of hits to the Alleycat site was 9,959 for the month of February. This has required installation of a second T1 line to handle the volume of Anywhere-Anytime Library business.

Contract with *epixtech* for URSA Software and support

TBLC has a contract with *epixtech* for URSA Software and support. There is pricing for maintenance and added software features.

Fees paid by participants

The participating libraries will be paying 1/2 of these costs in year 4 and the grant will pay 1/2. In year 3 this was $\frac{1}{4}$ and $\frac{3}{4}$. Central site functionality is included in the library calculations. The central site costs have been prorated based upon library size in three categories: single site, central site plus up to 5 additional sites, central site plus more than 5 additional sites. Credit has been given when a site has not implemented certain functionality such as extended circulation (University of Tampa, Clearwater, Heartland), or the OCLC link.

The amounts shown assume that all available functionality will have been implemented by September 30, 2001. Libraries added in years two and three would receive a discount for the warranty period that applies to them.

Maintenance Components and Match

	Extended Circ	TOTAL	Match	Authentication/ Shared System Designation
Clearwater Public Library	No	\$ 2,500	\$ 1,250	RPA
Palm Harbor Library	No	\$ 2,250	\$ 1,125	RPA
Pasco County Library System	Yes	\$ 3,850	\$ 1,925	Full
Pinellas Park Public Library	Yes	\$ 3,500	\$ 1,750	Full
Sarasota County Public Library	Yes	\$ 3,850	\$ 1,925	Full
St. Petersburg Public Library	Yes	\$ 4,075	\$ 2,038	Full/shared
SUNLINE	Yes	\$ 4,600	\$ 2,300	Full/shared
Tampa Hillsborough County Library	Yes	\$ 3,850	\$ 1,925	Full
Citrus County Library	Yes	\$ 3,850	\$ 1,925	Full
Heartland Library Cooperative	No	\$ 2,800	\$ 1,400	RPA/shared
Hernando County Library				Warranty
Manatee County Public Library				Warranty
Polk County Library Cooperative	No	\$ 3,625	\$ 1,813	Full/shared
University of Tampa	No	\$ 2,000	\$ 1,000	Full

Access to OCLC Direct Request

Libraries participating in Alleycat will have the capability of merging most interlibrary loan requesting into one operation by using the OCLC hook in conjunction with OCLC's Direct Request. This feature enables the move of interlibrary loan requests from Alleycat to OCLC.

RPA Software and Server

In 2001-2002 TBLC is implementing Remote Patron Authentication (RPA) for all libraries. This will enable the Gaylord and Horizon libraries to authenticate patrons and provide unmediated interlibrary loans until the SIP protocol is implemented by their library management systems (LMS) vendors. RPA will also be used to provide authentication for access to remote databases via WebFeat. A separate dedicated server has been purchased for RPA.

Content Available Electronically

The State Library plans to purchase a core selection of online databases for use by the people of Florida. TBLC will purchase WebFeat translators for these databases and for the Florida Memory Project, PALLMS (DCU Digital Project) and other databases. Translators will also be purchased to add the collections of Stetson University College of Law, Eckerd College, Saint Leo University, and Florida Metropolitan University.

The Electronic Resources Task Force, Electronic Resources SIG, Reference SIG and Librarians participants will continue to meet to select materials, provide support for each other, and enable discussion and trials of products. Beth Watson, Assistant Director, will coordinate this effort and efforts to broker purchases of online databases for member libraries.

Experience over the last three years has shown that unless there is a funding pool for a specific resource, the diversity of collection development goals and varied purchasing timetables of individual members works against negotiation of group discounts. What does work is to broker agreements based upon pricing negotiated by the only very large library in the region, Tampa-Hillsborough, or to connect members to SOLINET pricing when it is available. Tampa-Hillsborough shares its acquisitions timetable with TBLC so that member libraries can see in advance which databases will be available at reduced

prices and when they will need to order. A continuing goal is to have libraries agree on one database for general periodicals and to purchase it collaboratively.

It is expected that using this approach, coupled with the 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 using RPA. Other member libraries will need to use IP address or login/password authorizations.

e-books

The Librare collection will provide access to approximately 3,000 e-books purchased from netLibrary by October 2002. The collection is expected to continue to be developed in 2002-2003.

The e-book collection is made up of full-text, full-image copies of published books. Materials in business & economics, literature, and computers & technology make up a significant part of the collection. These e-books can be read and used online by library users from anywhere, at anytime.

In 2002 there are 35 participating libraries. Circulation averages 475 per month, with the heaviest use in computers & technology.

Internet Pathfinders

In 2002, health and medical librarians will develop Internet resource pathfinders to be mounted on the Anywhere-Anytime Library web portal. These pathfinders will guide information seekers to quality web sites for consumer health and medical information. For 2002-2003 staff of TBLC member libraries will develop a minimum of 2 additional pathfinders. The Webmaster will be responsible for making the content available on the website.

Union List of Serials (at Tampa – Hillsborough County Library System)

The ULS database is housed on Tampa's automation catalog server and provides indexes for search requesting.

ACTION PLAN

STATUS

Anywhere-Anytime Library Project Status 2001-2002

The Anywhere-Anytime Library project is a multi-year implementation of a virtual library for west central Florida. It has been conceived as a demonstration and pilot project for the creation of a virtual library that can be adapted and extended statewide.

Initial steps have included creation of the virtual catalog with patron initiated interlibrary loan capability (Alleycat), group purchases of online databases, collaborative collection development of an e-book collection utilizing netLibrary and work towards the development of a web portal.

The growth of Alleycat since it went live in May 2000 dramatically demonstrates how the project is filling unmet needs in the region.

May 30, 2000	Alleycat goes live with 5 library systems. <ul style="list-style-type: none">• SUNLINE libraries, this includes public libraries in Dunedin, Largo, Oldsmar, Safety Harbor, Seminole, Tarpon Springs and New Port Richey and college libraries at Clearwater Christian, Florida Southern and Southeastern.• Tampa-Hillsborough Public Library System, this includes Tampa-Hillsborough Public Library, the Bruton Memorial Library in Plant City and the Temple Terrace Public Library.• Palm Harbor Library• Sarasota County Library System• Pinellas Park Public Library
June 2000	439 Alleycat requests are filled this month.
July 2000	Alleycat is awarded LSTA grant funds for expansion in 2000/2001.
February 2001	The SPIN libraries go live on Alleycat. SPIN includes public libraries in St. Petersburg, St. Pete Beach, Gulfport and Gulf Beaches. Alleycat's software, URSA, is upgraded to version 2.6.
March 2001	1147 Alleycat requests are filled this month.
August 2001	Pasco County Library System goes live on Alleycat. This includes the Pasco County and Zephyrhills public libraries.
September 2001	Alleycat requests are filled this month.
December 2001	Polk County Library Cooperative goes live on Alleycat. This includes public libraries in Bartow, Lakeland, Winter Haven, Auburndale, Eagle Lake, Haines City, Ft. Meade, Lake Wales, Mulberry, Polk City, Dundee, Lake Alfred, Frostproof, the Polk County Historical and Genealogical Library and the Polk County Law Library.
January 2002	3144 Alleycat requests are filled this month.

During the 2001-2002 grant year the Anywhere-Anytime Library for west central Florida is being expanded into a web portal that includes Alleycat - the resource-sharing component, access to extended catalogs within Alleycat (Florida OCLC Subset, State Library, LINCC, LUIS, TBLC Union List of Serials Subset), patron authentication for Alleycat and remote database access, and a pathfinder to quality consumer health links.

Alleycat users are able to perform a one step search for returnable items that includes their home library's catalog and all of the other participating libraries. A combined results title list is returned. This list is de-duped based on a standardized number called an ISBN. The user can then select to request a title or to see additional information. Additional information includes bibliographic information and shelf status.

Patrons can enter their library card number at a participating library to be "authenticated" for interlibrary loan and access to commercial databases or they can use the Alleycat search service as a visitor. Authenticated patrons using Alleycat can request items to be delivered to their library outlet of choice. These patron requests become part of what is called "unmediated interlibrary loan." The user can locate needed items in participating libraries and through the extended catalogs, 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 the borrowers library.

When an item is not available at an Alleycat library, the request is transferred to OCLC using a feature called Direct Request. OCLC is a multinational library resource sharing organization that maintains a union catalog of the holdings of all member libraries. The union catalog is accompanied by an interlibrary loan system that allows participating libraries to lend and borrow materials from one another. Using Direct Request, the Alleycat user's home library staff can either allow the request to move forward to potential lenders in OCLC or mediate the request at this point. This process is transparent to the user. The transfer of materials is accomplished using the Florida Library Network Document Delivery Service. This is a statewide service, which is administered by the Tampa Bay Library Consortium.

In addition, patrons will soon be able to perform a search against the TBLC subset of the statewide union list of serials. After citation information is obtained from other database sources, patrons will be able to locate periodicals and journals titles and holdings in the union list of serials and request the specific articles. These requests will be also be filled through the OCLC component using Direct Request. Periodical requests are considered non-returnable. Many of these non-returnables can be delivered using software called Ariel. Ariel enables libraries to send and receive non-returnable items via email or computer-to-computer transmission. Ariel software is being implemented in most Alleycat participating libraries and can ultimately be used to send articles to clients directly via e-mail.

By October 2002, Alleycat will be comprised of the catalogs of 41 libraries. Together they have 108 outlets (places where people can pick up materials). These libraries are located in the twelve counties served by TBLC public library members. Together they serve over 3.7 million residents directly and 10,692 FTE higher education students. The combined resources of these participants are nearly 7.7 million titles. Seven different library management products, which are sold by six different vendors, will be seamlessly linked.

The following two tables provide a profile of the libraries and population served according to the *Florida Census of Population, 2000*, and an overview of vendor products in use at each library.

Libraries to be Linked by October 2002

County	# Libraries	# Library Outlets	Population	Size of Collection	Titles Per Capita
Citrus County Public Library	1	5	118,085	144,042	1.22
Heartland Public Library Cooperative – DeSoto, Hardee, Highlands and Okeechobee Counties	4	6	182,423	254,118	1.39
Hernando County Public Library	1	6	130,802	217,432	1.66
Hillsborough County Library Cooperative - Including Plant City and Temple Terrace Libraries	3	24	1,001,910	2,292,953	2.29
Manatee County Public Library	1	7	264,002	309,797	1.17
Pasco County Including New Port Richey and Zephyrhills Libraries	3	10	344,765	593,252	1.72
Pinellas County	12	24	887,988	1,828,694	2.06
Polk County Library Cooperative	11	15	483,924	667,305	1.38
Sarasota County Public Library	1	7	325,957	720,502	2.21
Public Library Sub Total	37	104	3,739,856	7,028,095	1.68
			FTE Students		
Florida Southern College Library	1	1	3,606	155,301	
Clearwater Christian College Library	1	1	984	92,491	
Southeastern College Library	1	1	2,302	93,165	
University of Tampa	1	1	3,800	275,000	
Academic Library Sub Total	4	4	10,692	615,957	
TOTAL	41	108	3,750,548	7,644,052	

Library Management Systems of Libraries Being Linked by October 2002

Dynix from *epixtech*

- Hillsborough County Library Cooperative
Including Plant City & Temple Terrace Libraries
- 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
- Pinellas Park Public Library

DRA Classic

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

Sirsi/Unicorn

- Hernando County Public Library

Polaris from Gaylord

- Clearwater Public Library
- Heartland Library Cooperative
DeSoto
Hardee
Highlands
Okeechobee

Endeavor

- University of Tampa

Innovative Interfaces

(III)

- Sarasota County Public Library

Horizon from *epixtech*

- Palm Harbor Library
- East Lake Community Library
- Manatee County Public Library
- Polk County Library Cooperative
Auburndale
Bartow
Dundee
Eagle Lake
Ft. Meade
Haines City
Lakeland
Latt Maxcy
Mulberry
Polk City
Winter Haven

This is a proposal for FY 2002-2003 which provides for the logical expansion of the Anywhere-Anytime Library: to enhance and develop the web portal, incorporate one step searching of databases, and enable users to get help from a librarian online in real time. The real time e-Reference component is being submitted as a portion of the Anywhere-Anytime Library and at the same time as a separate project in cooperation with the College Center for Library Automation.

Activities

Alleycat--Continuing Development of Functionality

From the point of view of the library user it appears that all libraries participating in the current project have the same functionality. In actuality, there is a technical barrier to providing a very important function on the library staff side of the project—extended circulation. This barrier affects libraries using the Gaylord – Polaris library management systems, Clearwater Public Library and the Heartland Library Cooperative libraries.

The URSA software creates a paperless interlibrary loan management system for the library and removes all of the cumbersome and routine processes that were so labor intensive when an item was requested and loaned using traditional methods. URSA sends requests to libraries showing that the item is available. The request shows up on the daily list that libraries generate in their circulation system, as material for which there is a hold. It is only at the time that the library checks the book out to the hold

shelf that the staff learns that it is an Alleycat request. The staff member then checks the item out in Alleycat. When it is received at the borrowing library a temporary record is created in the circulation system by the software. These features are all part of the extended circulation feature which relies on library management systems implementing the NCIP standard. The NCIP standard is currently not in place in the Polaris system.

During the grant year, it is expected that NCIP will become available and at this time the added functionality of request filtering and extended circulation will be implemented for the two Polaris systems. This capability has created the equivalent of a virtual staff member in the participating libraries, thereby enabling them to take on the increased volume of interlibrary loan activity that has come with Alleycat's direct patron requesting.

The functionality of enabling searches of the Union List of Serials will be expanded to include the entire statewide subset of the Union List of Serials as it has been entered into OCLC. OCLC as Library of Last resort will continue for all participating libraries.

WebFeat as an Enhancement Within Alleycat – Advanced Searching

One feature of the URSA software that has not yet been implemented is Advanced Searching. Using this feature and a product called WebFeat, it is possible to enter a single search using multiple search terms and search multiple databases. These databases need not be running on z39.50 servers or be z39.50 compliant.

The libraries to be available in Alleycat under already funded projects include all of the public library automation systems in the region, the automation system of the University of Tampa, the largest private academic institution in the region, and three smaller academic libraries that participate in SUNLINE. In addition, results will be returned for public academic institutions statewide and the State Library as part of the extended catalogs feature. Four additional private academic libraries are ready to contribute their holdings. They are web accessible but not all of them have implemented z39.50. Their integration into the Anywhere-Anytime Library can be accomplished as part of an advanced search within Alleycat when a web consolidator is added to the functionality. The WebFeat consolidator that utilizes "translators" to enable z39.50 and non z39.50 databases to be searched simultaneously is the selected methodology to accomplish this. Utilizing WebFeat for these sites will also demonstrate the feasibility of combining URSA with WebFeat, the software being employed by SEFLIN for their MyLibraryService.org.

WebFeat translators will be purchased for Stetson University College of Law, Eckerd College, St. Leo University and Florida Metropolitan University, Brandon Campus. Interlibrary loan for these collections will continue to be accomplished using OCLC. WebFeat translators will also be purchased for databases that will be available through the planned State Library virtual resource purchase for which \$1.5 million in LSTA funds will be set aside, for the Florida Memory Project and the PALLMS (DCU Digital Project) project site. Additional translators can be purchased to databases purchased by participants in the e-Reference project. The expectation is that there will be 15 translators purchased in the first year of this pilot expansion.

The Web Portal

As part of the Anywhere-Anytime Library Expansion Project funded by LSTA for 2001-2002, TBLC has hired a Webmaster who is currently designing the web portal. This work includes overall site design for <http://tblc.org> and individual branded designs for the Anywhere-Anytime Library and related services such as Alleycat and Librare (e-books).

The Webmaster will continue to maintain and develop the Anywhere-Anytime Library web portal. As additional functionality such as e-Reference and shared databases is added in 2002-2003, the Webmaster will enhance the site.

The Webmaster will continue to develop the portion of the portal dedicated to Internet resource pathfinders. These pathfinders point library users and librarians to “good” Internet sites, sites selected and annotated by librarians. A consumer health pathfinder is being developed in the 2001-2002 project. Participating libraries have discussed the addition of pathfinders for business, art, sports, science and legal information.

Virtual Reference

Many libraries currently offer e-mail reference service to complement in-person and telephone reference services. Now, libraries are going one step further and offering real-time reference service to their online users. Library users can chat with reference librarians online to ask basic reference questions, receive assistance with online resources and more.

A virtual reference service puts trained library staff on the web to assist online users with these rich resources. It is a way to extend the library’s helping hand to online users. A collaborative reference service which enables libraries throughout the region and the state to work together to serve their online users enables all participating libraries to share staff resources and expertise to provide more virtual reference help than one library could alone.

e-Reference is conceived as a collaborative project involving reference librarians in libraries throughout the TBLC region. The project is also being developed as part of a cooperative project with the College Center for Library Automation to demonstrate the ability of overlapping cooperatives to work together. This project, Collaborative Statewide Live Reference: CCLA and TBLC Working Together would bring more resources to the clients and would be operational for more hours than a TBLC-alone project.

As a TBLC member library project, this pilot would initially involve eleven libraries. The hours the virtual desk can be open would be limited by the number of participating libraries and the number of hours each is able to devote each week to the project. Commitments from the initial eleven libraries will enable the desk to be open 20 hours per week. The collaborative project with CCLA would expand the operational hours to 50. A concept document outlining the service is included as Appendix A.

Activities relative to the limited TBLC pilot project would include:

- Detailing guidelines for questions that constitute e-Reference
- Selection of vendor software to manage e-chat
- Purchase and setup of a server to run e-chat software
- Hiring and training a project coordinator
- Determination of hours of operation and scheduling
- Training of the people who will be providing the service. It is expected that each participating library will designate one or more person who will be their e-Reference librarian. All designated persons will receive a minimum of 10 hours of training in e-Reference interviewing, use of the software and effective use of the resources.
- Collaborative selection of a general periodicals or topical database to supplement the databases licensed by the State Library for statewide access.

Participant agreements have been received from the following libraries:

Library	Type	County	FTE/Population Served
Bruton Memorial Library (Plant City)	Public	Hillsborough	29,915
Citrus County Library System	Public	Citrus	118,085
Eckerd College Library	Academic	Pinellas	2,116
Largo Library	Public	Pinellas	69,371
Pasco County Library System	Public	Pasco	344,765
St. Petersburg Public Library	Public	Pinellas	248,232
Safety Harbor Public Library	Public	Pinellas	17,203
Sarasota County Library System	Public	Sarasota	325,957
Southeastern College Library	Academic	Polk	2,302
Tarpon Springs Public Library	Public	Pinellas	21,003
University of South Florida, St. Petersburg	Academic	Pinellas	3,900
University of South Florida, Tampa	Academic	Hillsborough	20,194
University of Tampa Library	Academic	Hillsborough	3,800

The expectation is that as a TBLC project this program would become operational in April 2003. The service will be available to anyone who lives in the region, even if his or her home library is not currently participating. The objective is to increase participation based upon a demonstration that this is a needed and viable service. As participation increases, the number of hours of operation will increase. Ultimately we expect to be able to provide 24/7/365 service by becoming part of collaboration with other libraries in the English-speaking world.

Training is an important part of this project. The virtual reference librarians will be trained to:

- use the virtual reference desk software,
- conduct a virtual reference interview,
- use electronic resources, both pay databases and free Internet resources, to answer reference questions

Publicity

Making residents aware of the rich resources their local libraries make available to them is an age-old library challenge. Development of the Anywhere-Anytime Library into a web portal works toward addressing this challenge. It serves as a single point of access that can be publicized to all residents in west central Florida. A uniform and straightforward message is the most effective. To further address this challenge a component of this project is to market the Anywhere-Anytime Library and the local participating libraries to the community via the Anywhere in the Community Initiative.

The Anywhere-Anytime Library will be marketed directly to citizens via the Anywhere in the Community Initiative to meet with targeted groups such as local chambers of commerce and Rotary Clubs, promotion to school media specialists at their professional development programs and to employees of the larger employers in the Tampa Bay region. We will utilize the services of a marketing consultant to develop materials for use with these groups. TBLC project staff will be available to make presentations to the targeted groups and will work with member library staff to prepare a PowerPoint presentation that they can take into the community

Staff of participating libraries will be ambassadors to the community. This offers an exciting opportunity to inform residents of all of the rich resources their public library makes available to them on their desktop. Residents will be educated on the resources available from their local library's website, online catalog and other methods along with the extended resource of the Anywhere-Anytime Library.

A promotional/instructional bookmark for Alleycat was issued late in 2001. It will be updated and promotional materials for the umbrella program, the Anywhere-Anytime Library, and peripheral

programs will be developed and distributed as these programs become operational. This will include the e-Reference service. A copy of the bookmark is included in the package.

The Alleycat cat provides a whimsical mascot for the Alleycat portion of the project. Participants have suggested creation of soft toys, mouse pads and other materials featuring the cat. This portion of the project is being “branded” on the web site and “Al E. Cat” is being featured. An early depiction is included in this packet.

Electronic Resources

Access to electronic purchases is a cornerstone in the development of a virtual library. TBLC will continue to negotiate group purchase discounts for electronic resources for member libraries. Group purchases enable libraries to enjoy greater discounts on the purchase of resources than could be realized alone. Volume purchase discounts benefit all participants. We have seen an increase in the success of negotiating these discounts when partnering with large library systems in the region. Partnering with a large system with significant purchasing power, like the Tampa-Hillsborough County Public Library has enabled smaller libraries in the region to participate in group purchases for access to resources they could not have afforded if purchased on their own. This partnership will continue in 2002-2003.

In 2002-2003 TBLC’s *Librare* project will be nearing its second full year of operation. *Librare* is a collaborative collection development project. A group of member libraries participate in the selection and share a collection of electronic books. These e-books are available to the users of the participating libraries from anywhere, at anytime, 24/7/365. Access to full-text electronic books is an essential resource for online library users.

Travel to Relevant Meetings

To be able to implement and manage this kind of cutting edge project, it is essential that the staff maintain current contacts with others who are working on similar projects. One way to do this is to attend national meetings. Travel will include sending one person to ALA Midwinter in Philadelphia, PA and one to ALA Annual in Toronto, Canada. At ALA meetings staff will network with other URSA users, discuss best practices with them, and meet with users and the vendor to provide input into vendor planning for software enhancements. It will be possible to attend users’ group meetings and to learn about the newest products and ways service is being provided. Staff will be available for speaking engagements and poster sessions. A sum has also been included in the grant budget for one person to attend the Computers in Libraries conference in Washington, DC. This conference is a staff development vehicle for people involved with new technologies.

TIMELINE OF ACTIVITIES

Segments: AAL Overall Project including Web Portal
 AC Alleycat
 eREF Virtual Reference
 ER Electronic Resources
 C Community Outreach

Date	Segment	Activity	Responsibility
July – August 2002	eREF	Evaluate vendors, investigate software	Assistant Director
Upon notification of grant award	AAL	Revise proposal and budget as needed to meet requests of funding agency Add evaluation material as requested Notify participants of award Determine final participant list based upon funding Negotiate maintenance contract extension with epixtech, URSA vendor Negotiate with vendor for modules or new connectivity to be implemented	Executive Director Assistant Director Technology Coordinator
August 2002	eREF	Establish guidelines for service	Assistant Director
October 2002	AC	Sign agreement with vendor for modules or new connectivity to be implemented Set timeline with participants and vendor for implementation of added features and addition of new participants Third year LSTA grant report is written and submitted	Executive Director Technology Coordinator
October - November 2002	eREF	Purchase and install software	Assistant Director Technology Coordinator
October 2002-September 2003	ER	Make access to purchased electronic resources available via the Anywhere-Anytime Library or other means	Assistant Director Electronic Resources Task Force Participating Libraries
October 2002-September 2003	AC	Arrange for translators from WebFeat to connect small academic libraries and purchased electronic resources	Technology Coordinator Library partners epixtech
October, 2002 – April, 2003	AC	WebFeat is integrated into advanced searching within URSA	Technology Coordinator Assistant Director epixtech
October 2002 – September 2003	AC	Union List of Serials is ordered from OCLC, indexed by epixtech and updated on the Tampa-Hillsborough server	Technology Coordinator Assistant Director epixtech Tampa-Hillsborough LMS Staff

Date	Segment	Activity	Responsibility
October 2002 – September 2003	AC	Continuing Library Training Library ILL staff schedule classes on new features for interlibrary loan and public service personnel in every library and every branch if applicable. 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.	Technology Coordinator Assistant Director Continuing Education Coordinator Library ILL staff Library staff
November – December 2002	eREF	Advertise for and hire e-Reference Support Staff	Executive Director Assistant Director
January 2003	AAL	Attend ALA Midwinter Meeting	Technology Coordinator
January – March 2003	eREF	Train libraries' staff	Assistant Director e-Reference Support Staff Contract trainers
January – March 2003	eREF	Design and develop promotional campaign	Marketing Coordinator Executive Director Assistant Director
January 2003 – September 2003	M	Anywhere in the Community will be taken to schools and workplaces to market library services and the Anywhere-Anytime Library.	Marketing Coordinator Library Partners
January 2003 - September 2003	AC	Advanced searching added to Alleycat virtual catalog and enhancements made to existing participants	Technology Coordinator
January - September 2003	AC	Library Training TBLC support/training staff schedule classes on all features for interlibrary loan and public service personnel in every new library and associated branch. After training the Library ILL staff will be able to access the system and be able to search and refine searches. Have the knowledge to move a request through the URSA software and handle requests coming from OCLC. Public service library staff will be able to show patrons 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 patrons.	Technology Coordinator Assistant Director Continuing Education Coordinator Library "Experts"
February 2003	AC	Alleycat Decision Makers Meeting	Executive Director Technology Coordinator Assistant Director Library partners
March 2003	AAL	Attend Computers in Libraries	Technology Coordinator

Date	Segment	Activity	Responsibility
March 2003	All	Midyear report written and submitted to State Library	Executive Director with input from staff and library partners
April 2003	eREF	Service goes live	Assistant Director e-Reference Support Staff Library partners
June 2003	AAL	Attend ALA Annual Meeting	Assistant Director
July 2003- August 2003	AC	Alleycat Decision Makers Meeting Alleycat Users Meeting	Technology Coordinator Assistant Director Executive Director Library partners
August 2003	eREF	Survey sent to users and staff	Assistant Director e-Reference Support Staff
October 2002 – September 2003	AC	Answer questions and assist staff of libraries when they need help Resolve problems and refer unresolved problems to <i>epixtech</i> Provide other support provided to staff of participating libraries as requested	Technology Coordinator Assistant Director Continuing Education Coordinator
October 2002 – September 2003	AC	Troubleshoot and resolve problems with the SUN server Troubleshoot and resolve problems with telecommunications Troubleshoot and resolve problems with the RPA server Back systems up regularly and maintain the server	Technology Coordinator Unix expert
October 2002 – September 2003	C	The project will be marketed to the public.	Executive Director Assistant Director Library Partners Marketing Coordinator
October 2003	AAL	Annual report written and submitted to State Library	Executive Director with input from staff and library partners

Sustainability

Ideally, TBLC will generate income from corporate sponsors to subsidize this project. With the slow economy this has not been accomplished. Efforts will continue to find a sponsor. In the future, a portion of any increase in Library Cooperative Grant Aid or inclusion in a funded statewide expansion will be needed to sustain the project. The participating libraries are expected to budget for their maintenance costs after 2003. It will be necessary to find other funding for staff and central site costs. The enormous increased volume of work is stretching the libraries' staff resources.

BUDGET NARRATIVE

Salaries and Benefits

TBLC Staff (FTE =2.05)

As described on the Inputs Section of this proposal, the following TBLC staff will manage and coordinate the project. Benefits included in the amounts shown are based upon actual benefits being paid for existing staff with an allowance for an increase in health insurance costs. The grant will pay all of the salaries except the Technical Assistant. TBLC will pay all of the benefits as part of the match and the SUNLINE libraries will pay for the Technical Assistant who will be exclusively processing their OCLC requests as part of the test of OCLC as library of last resort.

	Salary	Benefits	Estimated Total
Executive Director (0.1 FTE)	\$ 8,068	\$ 1,816	\$ 9,883
Assistant Director (0.3 FTE)	\$ 12,907	\$ 2,994	\$ 15,901
Technology Coordinator (0.4 FTE)	\$ 17,910	\$ 4,091	\$ 22,001
Continuing Education Coordinator (0.05 FTE)	\$ 2,034	\$ 483	\$ 2,518
Technical Assistant (0.15 FTE)	\$ 3,214	\$ 1,410	\$ 4,624
Webmaster (0.60 FTE)	\$ 21,630	\$ 6,768	\$ 28,398
e-Reference Support Staff	\$ 16,000	\$ 2,000	\$ 18,000
Total (2.05 FTE)	\$ 81,763	\$ 15,656	\$ 97,419

Participating Library Staff

As has been described in the Inputs Section of this proposal, the staff of member libraries will participate in planning, governance, implementation activities and training activities. The amount shown in the match here is estimated based upon the expected number of people who will attend meetings, select e-books, and provide e-Reference services and attend training sessions. The full charts are included in the Inputs section of the proposal. For calculation purposes the hourly rate used was based upon an overall average annual salary of \$32,000 plus an allowance of 25% for benefits. This is an extremely conservative estimate. Most of the people who attend these meetings are experienced MLS librarians. Library Directors often attend the Decision Makers meetings. The calculations are based on conservative estimates of the number of people who will attend sessions and include minimal travel time for each person. This information is included to emphasize the importance of the participating library staff time spent on this project. The budget does not include participating library staff time.

Library Materials

The match library materials amounts are conservatively based upon the current year experience. Librarians, the content component for e-books, is expected to receive \$2,000 from a minimum of 20 of the current 32 participants. All but \$8,000 of this will be spent to add new titles to the shared collection. The remainder will be reserved for promotional materials and administration. All remaining funds will be spent for additional materials. Purchases of NoveList, Books In Print, Grolier's Science Today and Standard and Poor's NetAdvantage already in progress this year will exceed the \$100,000 shown.

E-Resources to be purchased	Grant	Local
netLibrary		\$ 30,000
Database Purchases for Libraries		\$ 100,000
Total		\$ 130,000

Supplies

The match is for specially designed labels that the libraries use to designate that a book has been provided using Alleycat. Each book has a label affixed to the front. The label is removed when the item is returned to the lending library. TBLC purchases the blank labels in bulk and resells them at cost + \$1.00 for printing each box of 150 labels. This amount will cover the purchase of 240 boxes. Currently 3,000 items per month are being circulated on Alleycat. This amount will cover the 36,000 labels needed for this circulation level.

Other supplies will be provided by TBLC. Due to the time it would take to determine the exact cost, they are not included in the match.

Travel

Travel will include sending one person to the ALA Midwinter in Philadelphia, PA (\$ 900) and one to ALA Annual in Toronto, Canada (\$1,400). At ALA meetings staff will network with other URSA users, discuss best practices with them, and meet with users and the vendor to provide input into vendor planning for software enhancements. It will be possible to attend users' group meetings and to learn about the newest products and ways service is being provided. Staff will be available for speaking engagements and poster sessions. A sum has also been included in the grant budget for one person to attend the Computers in Libraries (\$800) conference in Washington, DC. This conference is a staff development vehicle for people involved with new technologies. Registration fees for these conferences (Total \$400) are included in the TBLC budget as staff development and are shown in the budget as part of the Travel match.

Equipment

The server to be purchase for e-Reference will meet or exceed the specifications listed here:

Server Specifications:

- 1 Processor (>800Mhz)
- 2Gb memory (1Gb / CPU)
- 4 18Gb hard drives (2 mirrored for the OS, 3 for a RAID5 & a hot spare)
- 1 100Mb NIC cards
- Windows Operating System
- Cost: Approx. \$3000

Other

Software License and Maintenance

In this year we will contract with *epixtech* for Request Filtering and Extended Circulation features for Clearwater and Heartland. Maintenance costs will also be paid to *epixtech*. The participating libraries are expected to pay ½ of the overall maintenance costs as outlined in the Inputs Section.

WebFeat Translators - New Libraries and Searchable non-z39.50 databases

Each new library that can be added within the Alleycat software would cost \$2,500 as a one-time charge, plus 15% per year maintenance after the first year. If a library obtains z39.50 connectivity before the implementation of WebFeat for that site is begun, a project revision will be filed. We believe it is more desirable to be fully integrated into the regional catalog and be searchable on the basic search because; 1) the software is purchased up front (a WebFeat translator is licensed on an annual basis and the cost remains the same (approx. \$1,000) each year, 2) interlibrary loan requests can be processed within the region, thereby cutting OCLC costs for the borrowing libraries. Interlibrary loans via WebFeat may only be placed in OCLC, and then would only stay within the participating libraries if the holdings have been properly set in OCLC.

The 15 translators to be ordered include the 4 libraries, one Internet search engine and ten databases. The 10 databases will include the Florida Memory Project, the DCU PALMM5 project, all or the databases purchased using LSTA funds by the State Library and as many locally purchased databases as the funds allow. Pricing from *epixtech* for 15 WebFeat translators includes integration into the advanced search function on the URSA product. The list price is \$1,000 per translator. 11-20 translators are discounted to \$950 each.

Union List of Serials Database and Indexing

The \$17,000 cost of this portion of the project is planned to provide for download of the entire state union list of serials. The list would then be available to everyone in the state when they log into Alleycat as a guest. It would be useable by those having library cards in Alleycat libraries to request periodical articles. If the cost is reduced to \$4,000 only the TBLC subset of the Florida Union List of Serials will be obtained and made available.

Telecommunications Infrastructure

Super T, 3Mbps service is being provided by Intermedia Communications. Monthly cost for this service is \$4,087.45. TBLC has qualified for e-rate for its Internet service for the last four years. E-rate has been approved to cover July 2002-June 2003. An allowance has been made for this. TBLC will pay for the connectivity needed for other TBLC programs and for maintenance of the equipment needed for this service.

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. An outside contractor at \$75.00 per hour will be hired on an as needed basis for general OS maintenance. Estimated time is 20 hours for the year. This will be part of the match.

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 41 libraries participating and they serve nearly 4,000,000 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 \$6,000 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.

These materials will also be distributed as part of the community awareness initiative. An additional amount has been budgeted for display preparation and other promotional materials.

A marketing consultant will be on-call to assist in preparation of materials for public distribution and arranging for visits to local corporations.

BUDGET

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

	F.T.E.	LSTA	LOCAL/STATE	MATCH
SALARIES & BENEFITS (Position Title)				
(All salaries to be paid from federal or local sources)				
<u>Executive Director</u>	<u>0.1</u>	\$ 8,068.00	\$	<u>1,816.00</u>
<u>Assistant Director</u>	<u>0.3</u>	\$ 12,907.00	\$	<u>2,994.00</u>
<u>Technology Coordinator</u>	<u>0.4</u>	\$ 17,910.00	\$	<u>4,091.00</u>
<u>Continuing Education Coordinator</u>	<u>0.05</u>	\$ 2,034.00	\$	<u>483.00</u>
<u>Technical Assistant</u>	<u>0.15</u>	\$ -	\$	<u>3,425.00</u>
<u>Webmaster</u>	<u>0.6</u>	\$ 21,630.00	\$	<u>4,061.00</u>
<u>e-Reference Support</u>	<u>0.5</u>	\$ 16,000.00	\$	<u>2,000.00</u>
TOTAL SALARIES		<u>\$ 78,549.00</u>	<u>\$</u>	<u>18,870.00</u>
 CONTRACTUAL SERVICES (List each vendor)				
_____		\$	\$	-
TOTAL CONTRACTUAL SERVICES		<u>\$</u>	<u>\$</u>	<u>-</u>
 LIBRARY MATERIALS (Include types of materials to be purchased)				
<u>eBooks – netLibrary</u>		\$ -	\$	<u>40,000.00</u>
<u>Databases</u>		\$ -	\$	<u>80,000.00</u>
TOTAL LIBRARY MATERIALS		<u>\$ -</u>	<u>\$</u>	<u>120,000.00</u>
 SUPPLIES (Specify)				
<u>Printed Alleycat identifier labels</u>		\$ -	\$	<u>3,600.00</u>
TOTAL SUPPLIES		<u>\$ -</u>	<u>\$</u>	<u>3,600.00</u>
 TRAVEL		<u>\$ 2,000.00</u>	<u>\$</u>	<u>1,500.00</u>
 EQUIPMENT (Equipment and furniture with a useful life of at least one year and a unit cost of \$1,000 or more)				
<u>e-Reference Server</u>		\$ 3,000.00	\$	-
TOTAL EQUIPMENT		<u>\$ 3,000.00</u>	<u>\$</u>	<u>-</u>
 OTHER (Specify)				
<u>epixtech software and maintenance</u>		\$ 40,750.00	\$	<u>20,250.00</u>
<u>WebFeat Translators</u>		\$ 15,000.00	\$	-
<u>Statewide Union List of Serials off-load and indexing</u>		\$ 17,000.00	\$	-
<u>Telecommunications Infrastructure</u>		\$ 14,000.00	\$	-
<u>SUN Server Maintenance</u>		\$ -	\$	<u>1,500.00</u>
<u>Marketing and Printing</u>		\$ 8,000.00	\$	-
TOTAL OTHER		<u>\$ 94,750.00</u>	<u>\$</u>	<u>21,750.00</u>
 TOTAL		<u>\$ 178,299</u>	<u>\$ 165,720</u>	<u>= \$344,019</u>