

Florida Library Network Council
Minutes
February 21, 2003
Tallahassee, Florida

The following council members were in attendance: Judi Ring, State Librarian, Barry Baker, Mary Brown, John Callahan, Jim Corey, Danny Hales, Betty Johnson, Richard Madaus, Diane Solomon, Joe Stines, Sandra Ulm and Julia Woods. State Library staff in attendance included: Mark Flynn, Dan Lhotka, Loretta Flowers. The meeting was held at the College Center for Library Automation, Tallahassee, Florida.

Judi Ring, State Librarian, opened the meeting at 10:00 am with a statement of support for the development and implementation of the Florida Electronic Library. The purpose of today's meeting is to bring everyone up to date with reports on activities relating to the deployment of the Florida Electronic Library, to review the Strategic Marketing Plan for the Florida Electronic Library as presented by Alexis Sarkesian, and to discuss and provide recommendations for evaluation and assessment for the Plan.

Minutes for November 1, 2002 were approved.

Note: After the November 1st meeting the FLNC conducted a formal vote via an email ballot on a motion introduced at the November meeting. The following motion was approved by the FLNC. "Motion to move Virtual Reference ahead of other Plan activities as reflected in the Plan's timeline and to endorse the LSTA Grant submitted in partnership by CCLA & TBLC for developing a cooperative based Florida Virtual Reference service as a Florida Virtual Library program." The motion passed.

Announcements

Judi Ring announced that Mark Flynn has been hired as the Coordinating Director for the Florida Electronic Library beginning February 1, 2003. Ms. Ring also announced the appointment of Loretta Flowers as the Division's representative on the Florida Library Network Council. Formerly Judi Ring was in this position prior to assuming her new duties as State Librarian.

A discussion ensued regarding the name change for the program from Florida Virtual Library to Florida Electronic Library. This change was recommended by the Marketing Director for the Gale Group and by Alexis Sarkesian, the Marketing Consultant for the program. It has been the experience of marketing professionals that the word virtual is difficult to promote to a general public audience. Electronic Library also reflects other Internet based services such as email and eGovernment, and is more commonly understood by the public. The decision to change the name was made by the former State Librarian, Barratt Wilkins prior to his retirement. Since that time, the name has been accepted by the new Secretary of State and has been adopted as the title for the program.

REPORTS

Database Program

Mark Flynn gave an overview of progress relating to public library access to the Gale Databases. As of February 1st, all but a small handful of public libraries had registered for access to the Gale databases. In the registration process, Gale collects information about each public library and uses the information for providing authentication for use of the resources. Authentication is done by IP address from within a public library and by library patron card number for remote users. As well, Gale has launched an extensive training effort in February providing 25 days of training in all areas of the State. Gale is partnering with the multi-type library cooperatives to provide this training. In each area, the training covers a mix of training types that include hands-on training for reference librarians (four hour class in a training lab), train the trainer sessions for librarians who manage training programs (four hour class in a training lab), and general presentations for the public (two hour presentation). So far the training has been well received.

The Marketing Department of the Gale Group is also putting together a print brochure that will be ready for demonstration at the next Florida Library Association meeting and will also be used in a mailing to all public library directors with a cover letter explaining the program from Judi Ring, State Librarian.

Marketing Plan.

Alexis Sarkesian of "Ask Alexis" a marketing consulting firm, presented the Strategic Plan for Marketing the Florida Electronic Library

Overview. Content was based on a variety of input sources including interviews with other state libraries, interviews with Florida librarians. The plan is written to address two target markets, one internal market meaning library institutions and librarians and the external market being the end user or Florida resident. There are six key goals for this plan

1. Establish an image for an identity for the Florida Electronic Library
2. Introduce elements of the Florida Electronic Library as they become available
3. Orchestrate a hard launch of the Florida Electronic Library once all of the elements are in place
4. Establish ongoing relationships with partners to assure continuing presence of the Florida Electronic Library among the two target markets (librarians and end-users)
5. Monitor the effectiveness of the initial outreach effort
6. Establish ongoing public information efforts

These six goals together provide an organized means of rolling out the Florida Electronic Library as a brand as well as the individual elements as they emerge from testing and become available for general use. This follows with a hard launch of the entire Web-

based service once all of the elements are in place. A hard launch indicates a great deal more effort especially with the use of a variety of media resources.

Alexis next described efforts being undertaken by Gale to promote access to the databases. Gale is establishing a web page that will promote the database program. Flynn demonstrated the artist mock up for this page

The purpose of this page is to give an identity to the program. It also offers utility to the extent that it aggregates all of Florida's digital content as available in one place. It also will offer information about progress of the program as more services are developed and become available and provides tools to help libraries promote access to the digital resources provided here. Eventually, when the portal becomes available, this web site will be a wrapper around that service. That service will be unique and would add great value to the site for end-users.

COUNCIL ACTION: After much discussion the FLNC advised against pursuing this approach and recommended that the Division hire a graphics design firm and have them design a logo and look for the Florida Electronic Library. An additional recommendation was to put off any sort of promotional event or soft launch until the end of the summer at the earliest.

In the meantime, the Division will pursue publicity about the database program targeting Florida public libraries and their provisioning of the Gale resources for their users.

Virtual Reference Project Report

Lucy Harrison from CCLA gave a report on the Virtual Reference Project.

This program is a collaborative project between the Tampa Bay Library Consortium and the College Center for Library Automation. It is currently being funded through the LSTA grant program as a pilot project of the Florida Electronic Library. Harrison presented an overview/demo of the current site under development.

Virtual Reference is the ability to reach information seekers at their moment of need, where they need help. With virtual reference software, information seekers can use a Web based interface to get help navigating their way through the maze of resources available to them. Librarians are able to address users needs and provide a human touch in the digital environment.

Today's chat reference software offers the ability to "push" Web pages to a user, automatically opening them in the user's browser window. Librarians can escort Internet users through the World Wide Web -showing them where to click, what to type and where, and how to evaluate the resources once they've found them. Librarians and users can even co-browse proprietary (privately purchased) databases and send files such as handouts, spreadsheets, or slide presentations to the user. Once a session ends, the user can choose to have a transcript of the live virtual reference session sent to their e-mail

address. The transcript provides a copy of all relevant points that were discussed during the session and a list of hyperlinks to the Internet resources visited during the session. Next-generation products will likely include the ability to communicate by voice, or incorporate streaming video.

Progress to date:

After an extensive procurement process, the vendor Docutek was chosen to provide the software application for the virtual reference project. Docutek was chosen not only because of cost considerations but also the willingness of the vendor to make modifications to the software to meet the needs of the project. To date, the servers have been configured. The hardware will consist of a test server, a main server, and a co-browser server. The project is now in the process of advertising for a full time coordinator position to be housed at CCLA. The project has hired a Web developer/programmer who is currently working on front-end web based interface. There is a steering committee for the project made up of participating libraries. The following decisions have been made by the committee:

- Collaborative reference desk would be staffed by librarians from participating institutions with a minimum of two librarians covering each scheduled time
- Operational hours would be from 10:00 am to 10:00 pm, seven days a week
- The service supports both a local virtual reference service and participation in the state-wide collaborative service
- Live local and email reference would be available through Docutek (with local staffing and scheduling)
- Local services would be a customized interface with the collaborative service offering email reference and chat options.
- Link to live chat would appear if someone is available to answer questions (for both local and collaborative services).

Next Steps:

- Beta testing is scheduled for April/May
- Training is scheduled for June
- The initial 40 libraries will go live in July

Currently, Harrison is preparing a second year LSTA Grant proposal. Year Two goals for the project are to 1) continue to build the infrastructure and support the collaborative service; 2) continue to build and expand local services, and 3) work with the NISO Committee on General Reference Standards.

Report on the Anytime-Anywhere Program at Tampa Bay Library Consortium

Diane Solomon gave an overview of the Anytime-Anywhere Program at Tampa Bay Library Consortium.

The Anywhere-Anytime Library project is a multi-year implementation of a virtual library for west central Florida. It was conceived as a demonstration and pilot project for the creation of a virtual library that could be adapted and extended statewide. Since 1999-2000 the project has brought together the rich resources of libraries in the west central Florida region. The Anywhere-Anytime Library project was recognized as an LSTA Exemplary Project in 1999-2000 and 2001-2002. The awards praised the project for its excellence in program planning, implementation and evaluation.

The Anywhere-Anytime Library project includes three major components:

- Alleycat, a virtual union catalog and interlibrary loan system
- Access to online resources including electronic books
- A one-stop access point for information resources

Alleycat, the virtual union catalog and interlibrary loan system, is the nucleus of the Anywhere-Anytime Library. Alleycat has become an integral part of services in participating libraries. Since May 2000,

- 92,020 requests for materials have been placed in Alleycat,
- 286,740 hits have been recorded on the Alleycat website

Alleycat has redefined interlibrary loan in participating libraries. Libraries that have implemented Alleycat have seen continued activity in traditional interlibrary loan accomplished using OCLC after implementation. Coupled with the interlibrary loan transactions conducted via Alleycat, this translates into exponential increases in interlibrary loan activity. In order to meet demand and benefit from the capabilities of the Alleycat interlibrary loan management software, many Alleycat libraries have shifted responsibility for some interlibrary loan activity into the circulation department. Alleycat's ability to interface with the local automation system to place holds and create temporary records for borrowed materials is another factor in how participating libraries are managing significant increases in activity.

The libraries participating in Alleycat have grown from 16 in May 2000 to 42 in 2003. In 2002 the group expanded to include five libraries in southwest Florida (SWFLN).

Together these libraries:

- have 108 outlets (places where people can pick up materials),
- are located in the counties served by TBLC and SWFLN,
- serve over 3.7 million residents directly and 12,000 FTE higher education students,
- hold nearly 8.3 million volumes,
- use 6 different library management products, which are sold by 5 different vendors.

The following timeline illustrates the growth of Alleycat and the corresponding growth of filled patron requests.

May 30, 2000 Alleycat goes live with 5 library systems.
June 2000 439 Alleycat requests are filled this month.
February 2001 The SPIN libraries go live on Alleycat. SPIN includes public libraries in St. Petersburg, St. Pete Beach, Gulfport and Gulf Beaches.
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 2018 Alleycat requests are filled this month.
December 2001 Polk County Library Cooperative goes live on Alleycat. This includes public libraries in Bartow, Lakeland, Winter Haven, Auburndale, Eagle Lake, Haines City, Ft. Meade, Lake Wales, Mulberry, Polk City, Dundee, Lake Alfred, Frostproof, the Polk County Historical and Genealogical Library and the Polk County Law Library.
January 2002 3144 Alleycat requests are filled this month.
February 2002 Citrus County Library System goes live on Alleycat
March 2002 2596 Alleycat requests are filled this month.
October 2002 Five SWFLN member libraries go live on Alleycat. The SWFLN libraries include Collier County Public Library System, Ft. Myers Beach Public Library, International College - Ft. Myers and Naples branches, Hendry County Library System, and Sanibel Public Library.
November 2002 The University of Tampa goes live on Alleycat.
January 2003 3104 Alleycat requests are filled this month.

Access to the materials represented in the catalogs of participating libraries is only the beginning of what Alleycat offers to library users. Additional features include the ability to

- search and request materials from library catalogs beyond the Alleycat system,
- search journal holdings in all TBLC member libraries
- provide remote patron authentication,
- access to electronic resources including Librare, a TBLC collaborative ebooks project,
- consolidate searching of non-standards compliant resources

Digital Collections

Mark Flynn gave a report on the Working Group for Digital Collections.

Since 2000, the Division has been providing LSTA funds for the digitization of valued information resources for the purpose of expanding access via the World Wide Web. To date, the Division has provided funding to an array of digital library collections including photographic archives in the Northeast Florida region, aerial photographs at the University of Florida, local history collections in the Florida Keys and in Southwest Florida, and the development of electronic finding aids for Florida's state university libraries. One of the goals of the Florida Electronic Library is to develop a strategy for

providing broad public access to Florida’s digital collections. This involves the development of a technological architecture that can support searching and retrieval of relevant digital resources.

To this end the Florida Library Network Council has approved the appointment of a Digital Collections Working Group that is charged with development of a technological architecture for linking digital library collections and guidelines, including the use of standards, for cataloging and providing access to these resources. To date, this group has met once and identified four different approaches being used in other states with more fully developed programs for digital library collections development. Over the next three months, the Digital Collections Working Group will conduct an assessment of these four programs and, using the data gathered, will pick a technological approach that is cost effective for Florida libraries. In the next year, it is the intent of this group to test a technological approach with a pilot project.

The criteria for selecting an approach will be:

- Cost (one time and ongoing)
- Technology employed
- How much work effort does it take at the central site
- How much work effort does it take at the collection site
- Does it meet expectations of participant librarians
- “Does it Work” Factor
- Timeframe for implementation
- Sustainability
- Scalability
- Central vs Distributed Approach
- Can it fit into the portal?

Brief Comparison of Four Models for State Technological Architecture

<u>Four Models for Digital Collection Technological Architecture to Support Statewide Access</u>			
North Carolina	Colorado	Texas	IMLS
Blue Angel Technoogies	CDP	Z39.50	OAI/PMH
Central Costs: low/Medium	Central Costs: High	Central Costs: High	Central Costs: Low
Cost to Participant: Low	Cost to Participant: Low	Cost to Participant: High	Cost to Participant: Low/Medium
Demand on Staff at Source Institution: Medium:	Demand on Staff at Source Institution: Medium	Demand on Staff at Source Institution: High	Demand on Staff at Source Institution: Low

The resulting program will seek to determine the feasibility of using a standards based metadata harvesting protocol to aggregate and provide integrated item-level search access to the digitization projects funded by Florida's Library Services & Technology Act. The program will implement a pilot program to test the requirements necessary to achieve state wide aggregation of information housed in Florida digital collections.

The program will also seek to identify best practices for interoperability among digital library collections and to provide training and tools, if appropriate, to assist projects in making any necessary enhancements to their data to enable aggregation. The first stage of the project will be to assess each Digital collection's capability and interest in participating in the community that will develop recommendations regarding collection-level description, best practices for interoperability, and/or participate in metadata conversion or enhancement. Projects that do not choose to participate actively will still be asked for summary information about their collections for inclusion in the collection registry being developed, and also may be asked to send any item-level metadata. Florida programs that choose to participate more actively, and that are selected for this purpose, will be offered opportunities to receive training and/or tools that may be developed during the course of the project. The metadata testbed that will be created during the project will be accessible in participating libraries and analyzed for usability and functionality.

Evaluation of the Florida Electronic Library

Cherie McGraw, Bureau of Library Development, described work she has undertaken to evaluate the LSTA long range plan, "Gateway to Information through Florida Libraries." The Florida Electronic Library represents Goal 1 of the LSTA plan and includes an outcomes based model for evaluating progress toward implementation.

There are five defined outcomes.

1. Florida residents use statewide licensed databases for informational needs.
2. Residents use the Florida Virtual Library portal to retrieve information from multiple sources with a single search engine.
3. Residents use the virtual union catalog to access holdings of libraries in Florida.
4. Residents obtain materials from any Florida library through interlibrary loan or a statewide virtual borrower's card.
5. Residents access digital or electronic local content through the virtual library.

Each outcome has listed outputs and an outcome indicator.

A discussion ensued regarding the appropriateness of the indicators listed for purposes of evaluating the implementation of the Florida Electronic Library. In addition, there are four pilot projects that have been associated with the Florida Electronic Library that have never been assessed or evaluated in terms of implementation of the State program. Two of the pilot projects were implemented before there was a plan.

COUNCIL ACTION:

The Network Council recommended that the Division undertake development of an evaluation component for the Florida Electronic Library and, in addition, the Division undertake an assessment and evaluation of the four pilot projects in terms of how

- they may inform development of the evaluation component and for refining the Plan elements for implementation
- the projects have developed technology and services that support the resource sharing goals of the evolving Florida Electronic Library, and implemented technology and services as outlined in *The Florida Virtual Library: Plan for Statewide Implementation.*

In addition, the Council recommended undertaking a process for refining elements of the Florida Virtual Library Plan relating to implementation of all of the modules relating to resource sharing. They include:

1. Implementation of a Union Catalog with the goal of providing access to Florida library holdings (incorporating both OCLC Union Catalog and Z39.50 searching capability);
2. Implementation of a standards based resource sharing management system that can support request and delivery of both physical and electronic materials to end users with the capability to operate within the library portal and with the union catalog;
3. Address statewide policy and procedures relating to FLIN protocols, revision of the FLIN manual, and explore making the virtual borrowers card a function of the union catalog and capable of supporting the state's ILL system and reciprocal borrowing agreements.

The meeting adjourned at 4:30 pm.

August 13, 2003