

DALNET / OWLS / Macomb Coop Meeting
The Library Network: Southgate, Michigan
February 4, 2000

Present: J. Bosler, L. Bugg, D. Callaway, P. Jose, E. Palmer, T. Turgeon

The meeting was convened to begin discussion on the possibility of preparing an LSTA grant to link three library systems: DALNET, Oakland-Wayne, and Macomb. The Library of Michigan FY 2001 LSTA Subgrant Guidelines were reviewed. It was agreed that requesting one grant for General Technology in 2001 and one grant for Promotion and Training in 2002 would be the best course of action.

The idea was to exchange ideas to facilitate a pilot project. Ideally, participants would like to link libraries in a seven county area for onsite and ILL access to information. The counties are: Livingston, Macomb, Monroe, Oakland, St. Clair, Washtenaw, Wayne.

Participants tried to recognize the non-technology part of the grant. Benefits would be to encourage teaching and learning by the community, and the follow through to connect with the public. Ideally, there would be patron blocks for patrons with overdue or none returned items. Address interlibrary concerns of participating libraries

Talk to *epixtech* about RSS; talk to CPS about ILL; talk to New Jersey about their model. Invite all to come and share ideas.

P. Jose will call the Library of Michigan to find out what a site is defined as, e.g. individual libraries or individual consortia or both. How will dollars be spent per site? Consider the following consortia: OWLS / TLN / MetroNet, DALNET / Horizon/ Im@gine, Macomb Region of Cooperation / Dynix.

Suggested meeting dates for a demo: February 24; 1-5 p.m.
February 28; 9-12 a.m.
at Macomb Community College South Campus for up to 20 people.

Talk to the Michigan Library Consortium- P. Jose; talk to the DALNET Collection Access Committee - J. Bosler.

Who would apply for the grant? Is one institution better than another?
The requester would probably be The Library Network.

LSTA Workshop Thursday, March 2
Next meeting March 14 Tuesday 9:30 a.m.

Consider reporting this grant to the professional community at the next annual MLA Annual Conference October 3-6, 2000 or November 3-6, 2000

Library of Michigan FY 2001 LSTA Subgrant Guidelines

Funding Area: Persons Having Difficulty Using a Library

Range of Subgrant Awards: \$5,000 - \$25,000 per site, up to \$125,000 total

The overall goal of the funding area is to encourage all types of libraries to provide the same quality and level of service to all patrons. "Difficulty using a library" may include visual, physical or auditory conditions, type or location of residence, or other factors that make it difficult for a person to use a library.

Activities may include the purchase of computers, equipment, or related software to provide improved library access to a specific population, library materials, or new programs and services to provide outreach to individuals having difficulty using a library. Requests to fund general library operations will not be funded. Proposals that include partner libraries or other appropriate community organizations in the planning and implementation of the project will be given priority consideration over stand-alone proposals of a single library.

Funding Area: Promotion and Training 

Range of Subgrant Awards: \$5,000 - \$20,000 per site, up to \$100,000 total

Subgrants may be awarded to assist libraries and cooperating groups of libraries to improve the level of library service in their area through promotion and training activities developed in response to documented needs of local residents. Both the need and the appropriateness of the proposed training, outreach program or promotion activities should be clearly documented.

Project focus must be limited to marketing, community awareness, or training. Examples include publicity about your library, it's collections, and programs, and training in literacy, tutoring, job readiness, or library use. Internet training centers are *not* fundable in this funding area. Cooperation among all types of libraries is strongly encouraged to ensure the maximum level of coordination and benefit from each subgrant. Proposals that include partner libraries or other appropriate community organizations in the planning and implementation of the project will be given priority consideration over stand-alone proposals of a single library.

Shared Catalog & Patron Initiated Request Project

Eileen M. Palmer, OWLS
Louise Bugg, DALNET
Tammy Turgeon, SLC

DALNET

- 24 member libraries of all types
- Macomb, Oakland, Wayne Counties
- 677,000 registered borrowers
- 9.75 million items

OWLS Library Network

- 138 member libraries of all types
- Oakland, Wayne, Washtenaw, Livingston and St. Clair Counties
- Introduced a virtual catalog in 1999:
 - 890,000 registered patrons
 - 5.1 million items
 - Eastern Michigan University, University of Michigan Dearborn, The Library Network, Baldwin Public Library, Orion Township Public Library and Schoolcraft College

Suburban Library Cooperative

- 20 member public libraries with 27 buildings
- Macomb, Oakland, Wayne Counties
- 400,000 registered patrons
- Shared catalog with 2.1 million items

Project Origin

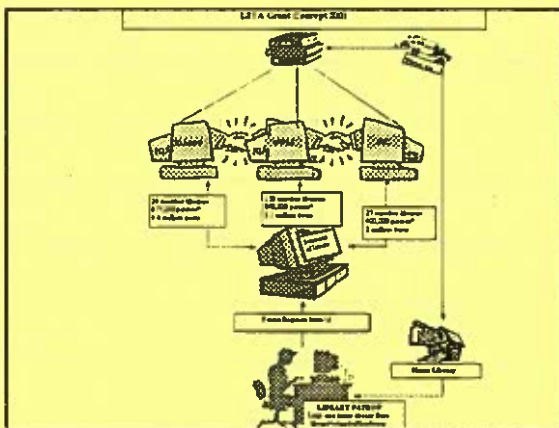
- DALNET migration to Horizon
- OWLS 1998 LSTA grant
- SLC 2001 migration to SIRSI
- Recognition of need:
 - Enhanced regional resource sharing with patron-initiated ILL
 - Prototype policies and procedures
 - Possible statewide model

Project Goals

- One stop-shopping for information
- Specialized user interfaces
- Easy access
- Prompt delivery

What Will We Do?

- Integrate the Library Cooperative of Macomb database with the OWLS Regional Virtual Catalog;
- Link OWLS server with DALNET server;
- Use third party software to provide patron authentication, & integration of requests with local library systems;
- Improve delivery of physical materials (extend existing delivery to additional libraries).



Project Issues

- Real time availability information
- Design of the interface
- Policies related to patron initiated requests
 - How do we reconcile differing policies and patron classifications
- Scalability
 - How can we grow the system
- Promotion to our users

Software Requirements

- Seamless integration with local systems
- True patron initiated borrowing
- NISO Circulation Interface Protocol (likely applicable standard)
- Support for CIP and non-CIP systems
- Broadcast searching across systems
- Not dependent on client software (uses browsers)
- Handles authentication

Committee Structure

- Overall Teams to coordinate across the three consortia
- Local groups within each consortium that correspond to the overall teams

Steering Committee

- ILL/Circulation Team
- Technical Implementation Team
- Design Team
- Training Team
- Promotion Team

Steering Committee Membership

- Chairs of the Teams
- 2 to 3 representatives from each consortium
- Louise Bugg, Chair

Steering Committee Role

- Project oversight
- Appoint teams/committees
- Software selection
- Communication with consortia Boards
- Listserv administration
- Fiscal oversight
- Project evaluation

ILL/Circulation Team

- ILL policies & procedures
- Circulation policies & procedures
- Data gathering
- System evaluation
- Implementation and testing
- Documentation and troubleshooting

Technical Implementation Team

- Hardware and software for each consortium
- Coordination among server and participant sites
- Z39.50 linkages
- Implementation and testing
- System evaluation
- Documentation and troubleshooting

Design Team

- User interfaces
- Indexing choices
- Screen displays
- Implementation and testing with users
- Documentation and troubleshooting
- System evaluation

Training Team

- Staff training for participating libraries
- User training
- Documentation

Promotion Team

- Promotion for participating libraries
- External promotion
- Public Kick Off
- Project visibility, including Webpages
- Help with naming the service
- Help with training and evaluation

Team Meetings

- Initial meeting of all teams with Steering Committee—one day in mid-February
- Regular meetings after that, as needed
- Use Listservs to communicate between meetings
- Activity of teams will vary during the grant

Process to Appoint Teams

- Steering Committee confirm receipt of volunteer forms
- SC will seek representation from all types of libraries and systems
- SC will appoint members and chairs
- Members will be asked if they can accept appointment
- Appoint by mid-February

Subscribe to
LSTA2001@umich.edu
to monitor the project

Timeline

- Waiting for Funding
- LSTA & Filtering
- 12 Month Timeframe?

Timeline - Month One

- Announce Grant Award
- Review Hardware & Software Options
- Organize Teams

Timeline - Month Two

- Purchase Hardware
- Purchase Software
- Gather Pre-Implementation Data
- Develop Lending Policies

Timeline - Month Three

- Develop PR pieces for project
 - Participating Libraries
 - Public

Timeline - Month Four

- Install New Hardware

Timeline - Month Five

- Configuration of software
- Connect online catalogs

Timeline - Month Six

- Train participating libraries' staff
- Develop online help screens
- Test hardware and software with staff

Timeline - Month Seven

- Participating libraries provide orientations for the public
- Begin patron use of new software
- Monitor use of the system
- Evaluate and correct any problems
- Begin delivery service connections

Timeline - Month Eight

- Distribute patron surveys in each ILL item delivered
- Develop web based survey
- Evaluate and correct any problems

Timeline - Month Nine

- Continue monitoring use of system
- Continue evaluation of software

Timeline - Month Ten

- Develop and implement staff surveys
- Reconvene teams

Timeline - Month Eleven

- Compile results from staff and patron surveys
- Gather post-implementation data from participating libraries

Timeline - Month Twelve

- Retrieve statistical information from software
- Final narrative report
- Final evaluation report

How You Can Get Involved

- Volunteer to serve on an overall Team
- Serve on a local group within your consortium or participating library
- One year commitment minimum
- Please complete a volunteer form

Questions?

Thank you for your participation

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