

**Florida Library Network Council
Meeting Minutes
December 6, 2004**

The following council members were in attendance: Judi Ring, State Librarian, Barry Baker, Mary Brown, John Callahan, William (Bill) Conniff, Loretta Flowers, Danny Hales, Betty Johnson, Richard Madaus, Joe Stines, Barbara Stites, Nancy Teger, and Julia Woods. Visitors included Chuck McClure and Charlie Parker. The State Library staff in attendance included Mark Flynn, Debra Flemming, and Dan Lhotka.

Judi Ring, State Librarian, convened the meeting with opening remarks.

Announcements:

- The Florida Electronic Library was launched December 3, 2003. A packet of marketing materials was distributed to the Council members to show the work that has been done to promote the FEL.
- Thomason-Gale has made available free access to an extensive array of databases for Florida K-12 schools that were destroyed or suffered loss of media center collections as a result of the four hurricanes that came through Florida this past year. This access will continue through September 2005.
- There is keen interest from Florida's public school community in having the FEL license extended to allow use of the Gale resources from within public schools. One of the goals of the Division for the FEL program is to find a means to make this happen. The Department of State has put forward a budget initiative for next legislative session to make funding available for this purpose.
- The FEL exhibited at the 2003 ALA Annual Conference in Orlando and also at the FAME conference (for school librarians) in Tampa. The FEL will exhibit in February at the Florida Educational Technology Conference (FETC) and the Florida Library Association annual conference.
- The current year's budget for FEL is \$2.5 million and is entirely expended to bring virtual library services to the residents of Florida. FEL is funded entirely through the Federal LSTA grant program. The next year's budget for the Division of Library and Information Services has been sent to the governor's office. Currently, there is no funding appropriated for the FEL from State revenue for this year. Next year's proposed state budget for DLIS includes an appropriation of \$750,000 for licensing the Gale resources for Florida's public school community. In addition, the proposed state budget for next year includes:
 - Continuation of \$31.8 million State Aid for public libraries.
 - \$10.4 million for library construction, but this is not a line item in our budget.
 - \$100 thousand for rural counties.

Council Action: Motion was made to adopt the Minutes of February 19, 2004. Motion was passed.

Evaluation: Producing a Florida Electronic Library Annual Report

Chuck McClure, Information Use Management & Policy Institute, presented an update on FEL evaluation activities. The FEL has contracted with the Institute to gather data and provide analysis for the purpose of producing the first Florida Electronic Library Annual Report. One outcome of this activity will be the development of a process for ongoing data collection on FEL usage as well as the development of a FEL database for tracking use statistics.

As part of this effort, the FEL has established a working group to define basic measure for assessing FEL activities. This group met in Gainesville and produced an evaluation action plan for the 2004-2005 grant year. The action plan entitled "Evaluation of the Florida Electronic Library 2004-2005" was distributed (see attached).

The group is now seeking comment from the FLNC and agreement on key data sources and methods for analysis.

In order to produce an FEL Annual Report it will be necessary to collect and evaluate data from all of the various components. Table 1 on p. 2 of the action plan sets out the Goals, Outcomes, Indicators and proposed data sources and methods of analysis for each of the FEL components. It also includes analyzing data collected and findings from the Marketing Study. Data will be collected from all services that are currently part of the FEL including usage reports from database vendors, data generated by the Ask a Librarian service and Florida on Florida as well as the statewide courier/delivery service used for ILL.

The chief objectives of this activity will be to develop coordinated data collection strategies describing the use, uses, and users of the various FEL components. A second objective will be to design an FEL evaluation database and offer evaluation reporting techniques to meet the needs of various groups interested in the development of the FEL.

In addition to this report, in the spring a study will be done to ask participating public librarians of their assessment of marketing and promotion of the FEL. Based upon this survey, the study group will suggest strategies by which the marketing (or perhaps education) effort might be improved and/or have greater impact.

McClure emphasized that the Annual Report must have data that will help our case to the Legislature and have data internally to manage a library. Data collection should be completed before the next fiscal year and an Annual Report produced for distribution in October 2005.

This new table seeks to refine the data collection to a more tactical level, defining the minimum data collection effort, so that data collection can be managed month to month yet still support the efforts at analysis necessary to demonstrate outcomes. Even though the deliverable for this effort is the FEL Annual Report to be produced and distributed by October 2005, the database will allow the FEL to produce reports on demand whenever needed. While the period of reporting for a printed Annual Report will be fixed to the Federal Fiscal year, the database will allow for other types of reports to be generated on demand for other needs, e.g. the State fiscal

year, the calendar year, or even custom reports produced on demand to highlight specific services.

Discussion ensued regarding data collection, data sources, indicators and analysis for each of the FEL components.

There are multiple data reporting mechanisms for Interlibrary Loan. There is a report from OCLC that reflects ILL activity within OCLC. It does not reflect non-OCLC ILL activity. There are numbers gathered on ILL activity among public libraries as part of the annual state data collection for public libraries. However, it only reflects ILL activity among public libraries and includes both OCLC ILL activity and non-OCLC activity. The TBLC URSA system also generates reports of ILL activity but does not reflect state-wide activity and includes both OCLC and non-OCLC activity. None of these mechanisms provides a total view of ILL activity state-wide from all libraries.

To date, the only ILL related data that is collected statewide are the courier statistics. All FLIN members participate in the courier for in-state ILL. Until there is a single state based ILL management system, the FEL will not have a single source of ILL data that can be used for measuring in state ILL activity and costs.

Data collection and analysis will not be done for the FEL library portal. The Portal is currently being implemented and is not in full production yet. Data collection for the Portal will be done next year when it is in production.

The FLNC also recommended that sources and methods be used that are sustainable. For example, this current action plan calls for using focus groups and user surveys to gather data for some of the components. Such data collection methods are costly and time consuming to produce and may be difficult to sustain on an annual recurring basis. It was suggested that data collection for the FEL be folded into other data collection efforts made by the State Library in an effort to make the FEL evaluation efforts cost effective.

There are funds to do surveys in this first year. The FEL will evaluate these methods in terms of the value added to the evaluation outcomes. If the data collected adds negligible value, the user surveys and focus groups will be discontinued for subsequent years. The goal of FEL evaluation is to have self-collected, system collected data.

McClure also facilitated a discussion among the FLNC about how to make promotion of the FEL more effective. The Council suggested marketing ideas for FEL statewide including:

- Make marketing materials a variable tool.
- Make local library Web pages better at presenting the FEL resources.
- Databases should be basic resources.
- What should be our target with the Google community?
- Who are our target users?
- Broader types of marketing ideas than Web pages to market FEL will include banners, email, radio, TV, newspaper, and print brochures.

- Localization of brochures and library information should be included.

These ideas will be tested in the survey.

Public Library Portal Project (MetaLib/SFX):

Mark Flynn presented a report and analysis of the Public Library Portal Project.

During the past year the FEL conducted a one-year trial implementation of MetaLib/SFX to demonstrate as proof of concept the development and functionality of a Florida Electronic Library Portal and to test the Ex Libris software in a production environment. The goal of this pilot project was to allow Ex Libris to demonstrate the refinement of MetaLib/SFX to meet Florida Electronic Library Portal requirements on a limited basis involving ten Florida public libraries.

The report distributed for this meeting entitled “Evaluation of selected components of the Florida Electronic Library” presents the evaluation of this pilot. The primary searchable resources for the Portal include database products from the Gale Group and OCLC FirstSearch, as well as bibliographic databases of libraries that have implemented the Z39.50 linking protocol.

Access to the pilot library portal began on February 19, 2004. Initial reaction to the portal from participating public library staff has been positive. The following comment was typical of first impressions:

“The design of the quick search page is great. The subdued color scheme and the uncluttered, simple design are aesthetically pleasing. The page looks clean and simple to search. The search box is well placed and easy to find on the page. The idea of a “Homework due tomorrow” option is excellent. Overall, the design of the quick search page makes for a user-friendly environment.”

Usability Results for the Metalib/SFX Interface

The Information Use Management and Policy Institute at Florida State University conducted usability testing on the resulting pilot portal. The tests were conducted at the facilities of four county public library systems. They were Volusia County, Orange County, Leon County and Jacksonville Public Library System.

The pilot project was delayed by software development. ExLibris was hoping to have a fully finished Version Three MetaLib software to start testing in March or April. ExLibris didn’t provide this software until September. The software wasn’t tested until October. We only had a month of testing with the fully functioning product.

In general, participants (a mix of library patrons and library staff members) felt the simple search features and retrieval of items to be adequate to meet the needs of most library patrons. The software does enable access to a simple but powerful search page with a look and feel akin to the Google search page.

None of the participants had used or seen the interface so none had any experience in navigation or use of the site. The lack of familiarity with the site along with the site not being fully implemented within a library interface limited the evaluation of the site by the participants. Participants could see potential for usability and usefulness of many of the features, but without the familiarity, the perspectives of both patrons and staff were that library patrons would not like, could not use, or want to use many of the advanced features. Additionally, without having a fully functional site to evaluate, staff participants in particular tended to view the site cautiously for patron use. Of primary concern for staff was the learning curve they perceived patrons would have to overcome to find the advanced features usable and useful.

In contrast to library staff, library patrons interviewed liked the ability to group databases into preconfigured grouping for quick searching. The relevant general search areas provided in the Pilot were considered by patrons as logical and practical. Patrons were comfortable with the site's advanced search features and thought the bookbag feature, with the ability to save searches into patron-created folders would enhance their ongoing use of database resources.

An added value to using MetaLib/SFX is the resource knowledgebase that we would subscribe to as part of implementation. There are many full text and other valuable library resources available on the Web offered for free. MetaLib/SFX includes a knowledgebase that is updated monthly for configuration and connection information for both the FEL licensed resources and resources available for free as well. This would have the affect of expanding the FEL resources to include over one hundred additional full text sites.

MetaLib/SFX Pricing

Another objective of the pilot was to identify the cost for scaling the portal statewide and maintaining ongoing operations. Ex Libris has proposed a pricing structure that will allow the costs of the portal to be distributed over three years and shared with libraries who wish to incorporate local electronic resources for their library patrons. The participating libraries agreed that statewide licensing of portal software would make it more likely for them to implement this kind of functionality and to do so sooner than if they had to seek this technology on their own. A statewide approach would be valuable to the public library community.

If we move forward with implementation of the portal as part of the FEL we will need for the software to be mounted in the state and run in-state. The Florida Center for Library Automation has agreed to host the application on a cost recovery basis. The total cost for implementing this module of the Florida Electronic Library will be half of what was projected in the original plan. The reason for this is that Ex Libris has agreed to license the software to the State incrementally, building upon the license fees already paid for MetaLib/SFX by the Florida Center for Library Automation and the College Center for Library Automation.

We estimate the cost of hardware for hosting the portal at \$50,000 as provided by FCLA. This will provide for hardware including a test server and a production server. The costs also include software to secure it and make sure it is protected on the Internet. It will be housed at the FCLA data center.

The total cost for implementing the FEL Portal would be spread out over a three year period. Year one would include one-third of the licensing cost plus hardware, installation, and cost recovery for FCLA. These costs are estimated at around \$225,000. We have this amount budgeted for the current grant year. Year two costs are projected to be about the same since we would be required to pay a little bit more of the licensing costs in year 2. Year three costs are projected at approximately \$210,000. After that the ongoing maintenance costs paid to Ex Libris would drop to about \$80,000 per year. With the cost recovery for FCLA added the estimated recurring cost in year four would be approximately \$100,000 a year.

The total cost for implementation over three years would be approximately \$535,000. This is consistent with the original estimate for portal development that was provided by RMG Consultants, Inc. as part of the original Florida Virtual Library plan. RMG had estimated implementation of the portal at between \$500,000 and \$1 million for startup and \$120,000 for annual recurring maintenance and support. Payments over three years would be subject to Federal and State appropriations for the Florida LSTA program.

At this point we are at a decision point. We have a full evaluation report that provides details about the software and how it should be implemented. We have documentation that the functionality offered by MetaLib/SFX is currently being sought out by Florida public libraries and would be of value to Florida library patrons. We have funds in our current year budget to begin implementation. Do we go forward?

Richard Madaus gave an overview of Ex Libris as a library vendor supporting library automation on a global scale. They are a multinational company with a customer base that includes Notre Dame, Harvard, the California Digital Library, and many other reputable institutions and consortia. Madaus also described the history of the company with the College Center for Library Automation and CCLA's experience with MetaLib/SFX. Barry Baker offered a summary of the SUS Libraries experience with MetaLib/SFX.

Joe Stines and Mary Brown asked questions about the cost to individual public libraries to participate. A public library would incur a cost only if the library decided to implement a separate instance of the software. Participating in the FEL's instance in a "group access" consortial arrangement would not require the payment of additional licensing fees. However, there would be some requirement for staff time to assist in the configuration of local library resources.

Council Action:

A motion was made and seconded to move forward with portal implementation using the MetaLib/SFX product. After further discussion, the motion was approved with one abstention.

Florida on Florida: Report on Metadata Harvesting for Florida

Mark Flynn gave a report on the status of the Florida on Florida project.

Since 2000, the Division of Library and Information Services 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 the Florida Photographic Archives, the Florida Memory Project, the Florida Everglades Collection, Florida aerial photographs, photographic archives in the Northeast Florida region, 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.

The FEL convened a Working Group to evaluate technology and make recommendations. The Working Group conducted an assessment and, using the data gathered, has picked a technological approach that is cost effective for Florida libraries: The Open Archives Initiative's Protocol for Metadata Harvesting (OAI/PMH).

The Open Archives Initiative framework was developed to make it easy for organizations with collections of metadata in library catalogs and other databases to contribute copies of their metadata to union databases used by central search services. In this model, the parties with collections of metadata are data providers and parties maintaining the central databases are service providers. The OAI framework provides a simple Web-based protocol for service providers to request metadata from data providers, and for data providers to respond with copies of their metadata records. It also provides a standard format for the contributed metadata, an XML rendition of Dublin Core.

To be a data provider within this framework, an organization must run specialized software, an "OAI broker," that can support the protocol for communicating with service providers. Some digital library applications have OAI broker software built-in; other applications do not. FCLA hired a consultant to work directly with the staff of participating sites to determine the best way to integrate the broker functionality within their environment. The goal was to impose minimal demands on contributors while building infrastructure for the sites to contribute to any OAI-based initiative.

In 2004, the FCLA under the direction of the FEL implemented a pilot statewide union catalog of digital materials, referred to as Florida on Florida. The pilot program is limited to six digital collections, material from the Florida Memory Project, and material from the state university system's (SUS) PALMM collections which include publications of archival, library, and museum materials. The collections are limited to materials related to Florida.

Over the past year, the FEL worked with FCLA and the FSU Institute to develop a usability assessment methodology. The key aspects of the evaluation project were:

1. Determine the ease with which expert and non-expert users can locate known materials in the collection;
2. Determine the ease with which expert and non-expert users can determine whether or not an item exists in the collection;

3. Determine the overall ease of use of the system by expert and non-expert users; and
4. Determine the extent to which the DCC interface meets selected accessibility standards.

The Institute's report on Evaluation Activities for the Florida Electronic Library provides a detailed analysis based on the above criteria.

To date, the pilot program has met with success and has implemented 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 collects data necessary to determine the requirements to achieve state wide aggregation of information housed in Florida digital collections. The program has also implemented a search interface that allows an end user to access a "union catalog" of all digital objects from participating institutions.

Flynn did a demonstration of the Florida on Florida site. Flynn also noted that this particular FEL service captured the interest and imagination of school media librarians at FAME.

The Council made the following comments as recommendations:

- Keep the focus on Florida as a topic
- Encourage other collections to incorporate Sunshine State skill set to make digital material more useful to the Florida K-12 community
- Encourage harvesting from all Florida related digitization projects whether funded through LSTA or other funding sources. Seek to make the service comprehensive for Florida.
- Include Florida on Florida whenever we exhibit or make presentations to target users, particularly Association of Counties, League of Cities, other organizations for local government officials.
- Continue to convene a group of stakeholders to encourage development of Florida on Florida
- Follow through on recommendations made by FCLA staff as noted in the final technical report from the project

Flynn will be presenting on "Florida on Florida" at the annual meeting of the Florida Library Association.

Interlibrary Loan Management: update and discussion of trends

Flynn presented an overview of national and statebased trends with ILL management and other resource sharing technology.

Flynn gave a summary of a report issued in the summer of 2004 by the "Association of Research Libraries entitled "Assessing ILL/DD Services: New Cost Effective Alternatives." This report represents the third cost analysis study on Interlibrary Loan in ARL libraries produced by Mary E. Jackson. This particular report offers, for the first time, analysis of performance on user initiated services. User initiated services are defined in the report as "requests that do not require

ILL staff to handle or process them, but are received directly by a potential supplier.” This study confirms that user-initiated ILL provides better service to users than mediated ILL. In most cases, user-initiated services have lower unit costs, higher fill rates, and faster turnaround time than mediated services. Consequently, the study recommends “moving as much mediated ILL traffic as possible to a user-initiated service, and as soon as possible.”

Flynn suggested that Council members acquire a copy of this report and compare the findings with ILL usage trends within their own library and community of users. A discussion ensued on how to collect similar data in Florida in order to do comparative analysis.

The second document presented by Flynn was a powerpoint presentation entitled “New ILLINET/OCLC Pricing for All ILLINET Libraries from the State Library of Illinois. This document describes a new pricing model for providing full access to OCLC based cataloging, ILL, and a Union Catalog for all 2700 libraries in Illinois. The pricing scheme uses the new Group Contract flat fee pricing scheme now being offered by OCLC. The cost for Illinois is \$3 million a year for a three-year contract for a total of \$9 million. Georgia has contracted with OCLC to do the same thing for the public libraries in that state for \$500,000 per year.

- The Council recommended that the State Library continue to monitor trends in flat fee Interlibrary Loan and resource sharing technology.
- Barbara Stites-Goodwin offered to provide assistance to the State Library in developing a plan for data collection for Florida about ILL, reciprocal borrowing, and other resource sharing activities. The focus of data collection would be to provide a basis for comparative analysis of Florida trends to national trends.

Meeting Adjourned at 4:30 p.m.