

**Library Services and Technology Act  
FY 2001 Subgrant Application**  
See Subgrant Guidelines for Complete Instructions

Funding Area: (select only one)

- Adaptive Technology
- Children in Poverty
- General Technology
- Persons Having Difficulty Using a Library
- Promotion and Training

Applicant Library Name: OWLS Region of Cooperation

Address: (Street/PO Box) 13331 Reeck Road

City/Zip Code/County: Southgate, MI 48195

ROC Affiliation: OWLS

Amount Requested: \$ 125,000

**Project Administration**

Fiscal Agency: The Library Network Fiscal Agency's Year End: September

Fiscal Agent Name: Lianne Clair Title Controller

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Library Director Name: A. Michael Deller Title Director

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LM Use Only

Amount Awarded: \$ \_\_\_\_\_

Project #: \_\_\_\_\_

The original and five copies of the application must be RECEIVED at the Library of Michigan no later than 5:00 PM on April 28, 2000.



Library of Michigan  
Attn: LSTA Team  
PO Box 30007  
Lansing, MI 48909

Applicant Library Name: \_\_\_\_\_ OWLS Region of Cooperation \_\_\_\_\_

### Abstract

Use only space provided

Estimated Number of Persons to be Served by Project: 4,530,760

**Target Population's Need for Project:** This project focuses on very specific needs of our library patrons:

*One Stop Shopping for Information; Specialized User Interfaces; Easy Access; and Prompt Delivery*

We need to develop "holistic" library services – to serve the information needs of the whole person with delivery mechanisms which break down our tradition of categorizing information. In today's society the student researching current marketing trends, the parent taking a child to story hour, the child seeking assistance in caring for a parent and the entrepreneur developing a business plan are all the same person – yet we often send them to different libraries for each information need, or expect them to rely on mediated mechanisms such as interlibrary loan. This project addresses the needs of our patrons by providing them with direct access to the region's major academic, public and special library resources.

#### Project Description and Activities:

This project will link the OWLS regional catalog, the Library Cooperative of Macomb catalog and the DALNET system to provide a unified set of resources to residents in southeastern Michigan. We will:

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

### Narrative

#### Must include all of the following:

1. **Eligibility** - Describe how the applicant library meets the Library of Michigan's eligibility requirements (see General Guidelines).
2. **Program Goal II** - Describe the relationship of the project to the Library of Michigan LSTA Program Goal II: *To increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.*
3. **Project need** - Describe how you determined the need for this project. Provide statistical data and demographic information. Cite sources of all data used.
4. **Meeting the need** - Describe briefly how you will determine when this need is met. Then, describe fully in the evaluation section of the proposal.
5. **Current level** - Describe the current level of library and information service provided to the target population. If project is technology related, also describe the technology needs of the library, including a description of the current technology and longer term technology plan for the library.
6. **Cooperation** - Describe the established history of resource sharing and cooperation with other libraries and/or community agencies.
7. **Networking plan** - Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.
8. **Financial need** - Describe the financial needs of the library.
9. **Local resources** - Explain the local resources that will be used to assist with the project, such as funding, outreach, or technical support.
10. **Continuation** - Describe the plans to continue the project beyond the subgrant period. Include plans for funding, and if applicable, for the use of project evaluation in support of future funding.
11. **Awareness** - Describe how the target population will be made aware of the improved library service.

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**Narrative**

Reproduce as necessary

**I. Eligibility** - Describe how the applicant library meets the Library of Michigan's eligibility requirements (see General Guidelines).

The Oakland Wayne Washtenaw Livingston St. Clair (OWLS) Region of Cooperation has been in existence in various forms since the early 1980's. Originally designated by the Library of Michigan to serve Wayne and Oakland counties, OWLS grew to include three additional counties and currently numbers 145 libraries of all types among its membership. As a Region of Cooperation OWLS is eligible to apply for LSTA funding under rules outlined in the LSTA FY 1998 Subgrant Program Guidelines. As a beneficiary of previous funding under the Library Services and Construction Act, OWLS has always focused its efforts on resource sharing and the application of new technologies to extend the impact of its resource sharing projects.

Although OWLS is the lead applicant, this is a collaborative project. Our partners in the project are the Library Cooperative of Macomb and the Detroit Area Library Network (DALNET), a library consortium made up of academic, public and special libraries.

**II. Program Goal II** - Describe the relationship of the project to the Library of Michigan LSTA Program Goal II: *To increase equity of information access by providing special assistance to areas of the state where services are inadequate (underserved rural and urban communities), and to libraries that are working to provide service to persons having difficulty using a library.*

Through this project the participating agencies will create the linkages necessary to allow for patron initiated interlibrary loan that would seamlessly integrate with local library systems. With the linkages already in place this would allow for a virtual catalog of libraries in six counties creating a one-stop approach to locating and requesting library resources in southeastern Michigan.

One deep and abiding commitment common to all libraries, be they public, private or academic, is the timely delivery of information to their patrons. Information is not a passive thing. It feeds and nourishes the knowledge we already possess. It provides strength and power to conduct our daily lives and as such it gives a purpose to the work libraries undertake daily. Typically we accomplish this through strong collection development and well-developed resource sharing relationships. In practice we find that our libraries meet about 80% of patrons needs within the region. We will then go to sometimes outrageous lengths to secure the remaining 20% of the materials requested by our patrons. We do this because we are committed to provide whatever assistance is required to serve our patrons. Increasing the 'equity of information access' is a fundamental part of every decision we make regarding service delivery in our libraries - not just something we think about when it is time to write a grant.

This project was developed to extend the resources of our libraries to each other in ways that we have not previously attempted and to improve the service mechanisms we use to meet our patron's information needs. This project addresses the Library of Michigan's Program Goal II because it's sole focus is on providing library patrons in southeastern Michigan with a unified set of resources and to empower them to access those resources where and when they need them.

50% of the state's population will be served by this project. The funding we are requesting represents an investment of three cents per capita for the population served. Through this project we will provide a unified set of resources to residents in Livingston, Macomb, Oakland, St. Clair, Washtenaw and Wayne Counties serving a combined, highly urbanized population of 4,627,870 (SEMCOG, July 1, 1999).

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Specifically, we address the following activities within Goal II, Activity A, as documented in the LSTA Five Year Plan:

- Provide support for establishing or enhancing the electronic linkages among or between libraries, including local, regional or statewide networks.
- Assist Michigan libraries to establish or participate in consortia for efficient sharing of resources and to lower costs.
- Assist efforts to create and continue regional cooperation among all types of libraries.

III. Project need - Describe how you determined the need for this project. Provide statistical data and demographic information. Cite sources of all data used.

### Patron Need

Libraries of all types have many things in common, especially our patrons. While we have traditionally recognized many of these similarities, we are only recently coming to an understanding of what it means when we say that our patrons are shared. More and more the people we serve in the public library are also being served by an academic and, perhaps, a special library. Our participating libraries are identifying new ways that we can serve these shared patrons with a minimum of rules and procedures. It is interesting to note that in studies of borrowers, DALNET estimates shared patrons as high as 30% of the total 676,818 borrowers. This number will clearly continue to rise.

OWLS members have recently created a virtual union catalog built around addressing the needs of our shared patrons. To better understand the nature of these shared patrons it is important to understand who they are. In a previous grant we targeted the adult learner as a significant part of that shared patron group.

Adult learners comprise an increasingly greater proportion of the student population, and these older students (24+) differ from traditional college students in significant ways. Statistical reports which profile current student populations found that 48% of all students were classified as financially independent or as an adult student who is head of a household. More likely to be part time students (41%) these reports further indicate that 81% of the independent students are single-parent women providing for a family. These reports document what many of us assume, that adults who return to college tend to be in transition and are either passing through a life crisis or just passed through a life changing experience (e.g. divorce, unemployment, geographic relocation). These students tend to be sacrificing more than traditional students to attend college and are highly motivated. Most of these students are employed full time, carry additional outside responsibilities and have a broader range of outside commitments than do traditional students. They have different learning characteristics about which little is yet known as are their requirements for support in study skills, research skills and library activities. To complete the picture, most of these students commute some distance to the college that offers the programs that fit their needs. The significance of the last point – often the closest and most convenient library is their public library or the library at work. In serving the adult student there is a greater need than ever before for libraries of different types to cooperate and provide access to the widest possible range of materials.

The adult learner, while certainly presenting unique needs, helps illustrate the changing needs of many library patrons. We see a need to develop “holistic” library services. We must serve the information needs of the whole person with service delivery mechanisms which break down our tradition of categorizing information delivery. In today’s society the student researching current marketing trends, the parent taking

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a child to story hour, the child seeking assistance in caring for a parent and the entrepreneur developing a business plan are all the same person – yet we often send them to different libraries for each information need, or expect them to rely on mediated mechanisms such as interlibrary loan. All of our libraries share mission statements focusing on serving life long learning needs. Indeed, our Governor often identifies life long learning as a necessary element in enriching Michigan's economic base. We believe a key to serving life long learning needs lies in developing an understanding of the context in which life long learning, both formal and informal, occurs. Through this grant we wish to redesign our service delivery to respond more directly to the needs expressed by our patrons.

In DALNET's Vision for the Next Generation, they identify patron information needs similar to those identified by OWLS and the Library Cooperative of Macomb. Specifically:

- One Stop Shopping for Information
- Desktop Delivery
- Customizable and Specialized User Interfaces
- Easy Access and Prompt Delivery

The use of technology to improve service delivery in libraries has been around as long as bookmobiles and telephones, although the last 50 years have seen its most dramatic impact. And yet we are often unable to embrace and implement new technologies as quickly as we might like – often because innovations are costly and bring with them the necessity of re-examining protocols and procedures which have been relied upon for some time.

Our patrons must be able to get the information they need when they need it and in the format that is most useful to them. When OWLS introduced its virtual union catalog in 1999 it was greeted enthusiastically by librarians and patrons alike. But the most frequent comment was “When can we request materials directly from these other libraries?” This proposal acknowledges that a union catalog, in today's information driven economy, is not fully functional without a direct request mechanism that empowers the patron to request materials unassisted and delivers said materials to the appropriate library for pick up.

### Library Need

Library staff are used to the 80/20 rule. We know that we will fill 80% of requests for materials we do not own within our local region (based on current resource sharing agreements) and that we will spend 80% of our resource sharing budgets trying to fill the remaining 20% of our patron's needs. We also know that traditional interlibrary loan is one of the most costly things we do. A 1998 study by the Association of Research Libraries (ARL) found that, on average, college libraries spend \$12.08 to obtain an item for a patron. Generally it takes about 11 days to obtain the item, which we do 91% of the time.<sup>1</sup>

But this study looked at more than the averages. It looked at what common elements could be identified in libraries with high performance/low cost operations. This type of cost/benefit analysis is unusual, although the common elements were there (just waiting to be identified). ARL Senior Program Officer for Access & Delivery Services, Mary Jackson identified several common elements among high performance/low cost ILL operations;<sup>2</sup>

- User-Initiated Ordering. As noted in the study “Systems that pass electronic patron request forms directly to the potential lender ... eliminate the need for ILL staff in these initial steps of the borrowing

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process. Staff costs represent two-thirds of the borrowing unit cost, so by increasing user-initiated ordering staff costs are lessened and the borrowing unit cost is thus lowered.”

- **Maximizing Technology.** High performing libraries require electronic submission of requests; ILL messaging systems; and ILL fee management systems.
- **Delivery Technologies.** High performing libraries are supported by, typically, several delivery systems (electronic and courier).

So we are up against the unassailable conclusion that those very technologies our patrons want, in order to improve service, are the very technologies that studies indicate will allow us to maximize efficiency and lower costs.

**IV. Meeting the need** - Describe briefly how you will determine when this need is met. Then, describe fully in the evaluation section of the proposal.

Improving service, increasing efficiency and lowering costs are major undertakings in any project. But in this case the project is made easier by the many “pieces of the pie” already in place. The project will build on three existing resource sharing projects by providing linkages that will allow for patron initiated interlibrary loan between and among these systems. Through these linkages we expect to improve service to patrons by not requiring them to be in a library in order to directly place ILL requests and to improve the efficiency with which library staff handle these requests. For specific performance measures please see the Evaluation section. Please see Appendix A for a schematic of our project.

This project was developed for the purpose of addressing several goals:

- To share resources among libraries of all types in southeastern Michigan, building upon existing resource sharing practices;
- To provide a quicker and more efficient way to share holdings and availability information;
- To provide patrons with the ability to initiate interlibrary loan requests on their own;
- To provide for the delivery of requested materials into the hands of patrons more quickly, and;
- To develop a prototype system that would provide the above and provide a forum to successfully address issues related to the internal library policies and procedures required for such a system to be successful.

Software is now available which builds on three technologies necessary to achieve our vision: Z39.50, the NISO ILL protocol and the Circulation Interface protocol (CIP II). We will use all of these standards to provide seamless interoperability among the databases of the Library Cooperative of Macomb, The Library Network, the DALNET member libraries and the other members of the OWLS Regional Virtual Catalog ([owls.mlc.lib.mi.us](http://owls.mlc.lib.mi.us)).

The specific steps of our project include:

- Integration of the Library Cooperative of Macomb database with the OWLS Regional Virtual Catalog;
- Use of third party software to provide patron authentication, and integration of ILL requests with local library systems on both the OWLS and DALNET servers;
- Linkage of the OWLS server with the DALNET server;
- Improved delivery of physical materials (extending existing delivery to additional libraries).

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Statewide services such as AccessMichigan have greatly enhanced our ability to deliver electronic information to our patrons. In fact, due specifically to the AccessMichigan databases many of our libraries have seen a decline in the number of ILL requests for materials now available electronically (like journal articles). We see this improved service delivery as an impetus that challenges us to make sure our patrons can obtain materials not yet found in electronic form equally easily and quickly. The linkage of these three consortia and implementation of patron initiated interlibrary loan will allow us to meet our patrons' growing information needs.

**V. Current level** - Describe the current level of library and information service provided to the target population. If project is technology related, also describe the technology needs of the library, including a description of the current technology and longer term technology plan for the library.

**Cooperation** - Describe the established history of resource sharing and cooperation with other libraries and/or community agencies.

To address the current level of service and cooperation it is useful to discuss each of the project partners.

### DALNET

DALNET is a consortium of academic, public and special libraries located in Southeast Michigan. Founded as a non-profit corporation in 1985, DALNET enables its members to better serve the information needs of their users through cooperative efforts among multi-type libraries in the seven southeast Michigan counties by sharing advanced automation applications.

DALNET members serve 676,818 borrowers. Combined collections total more than 4.4 million volumes and support annual circulation of nearly 2.8 million. DALNET members include the following:

Botsford Hospital  
Detroit Medical Center (7 locations)  
Detroit Institute of Arts  
Detroit Public Library  
Detroit Public Schools-Professional Library  
Henry Ford Museum & Greenfield Village Library  
Macomb Community College  
McGregor Public Library of Highland Park  
Oakland Community College  
Oakland County Law Library  
University of Detroit Mercy  
John Dingell Veterans Administration Medical Center  
Walsh College  
Wayne County Community College District  
Wayne State University  
William Beaumont Hospital

DALNET members agree to share an online system, contribute to its database and are committed to resource sharing. Recognizing that patrons demand access to information beyond the walls of their local library or campus, the DALNET Board has an established committee and a working taskforce assigned to

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investigate, recommend and implement actions related to access management and resource sharing in today's world of networked digital resources.

The DALNET libraries are all equipped with a new system called Im@agine, which uses Horizon<sup>®</sup> software, a product of *epixtech* (formerly Ameritech Library Services).

### Library Cooperative of Macomb

The Library Cooperative of Macomb is a network of public libraries in the Macomb County area which have joined together to secure services which can be performed more effectively and economically as a group. Established in 1978 under Michigan Public Act 89 of 1977, the Cooperative provides member libraries with several important services, ranging from automated circulation of library materials to access to the Internet. The Library Cooperative of Macomb also assists member libraries in a variety of ways in their efforts to better serve the public. The Library Cooperative of Macomb serves over 808,100 residents of Michigan.

Libraries in the following communities are members of the Library Cooperative of Macomb: Armada, Center Line, Chesterfield, Clinton Township, Eastpointe, Fraser, Harper Woods, Lenox, Macomb Township, Mount Clemens, New Baltimore, Richmond, Romeo, Roseville, Shelby, St. Clair Shores, Sterling Heights, Troy, Utica, Warren, and Washington.

The Library Cooperative of Macomb manages the *epixtech* online system for its members. A shared database of over 2,000,000 items provides over 400,000 registered patrons with easy access to information sources. Annual circulation exceeds 3.5 million. The Cooperative has been online with this system since May 1991. By using this system, libraries throughout the cooperative can access the holdings of all of the participating libraries, check out items to patrons, place holds on items, process library materials, and access the Library of Michigan and the University of Michigan.

### OWLS Region of Cooperation

The membership of the Oakland Washtenaw Wayne Livingston St. Clair Library Network, (OWLS) is as varied as it is resource-rich. Membership is comprised of four large academic institutions, twelve small universities and colleges, five community colleges, fifty three schools, fifty two special libraries, and sixty four public libraries in ninety two buildings. The total population served by OWLS is over 2.5 million. It is a fast growing, well educated area.

The libraries within OWLS have a strong history of, and commitment to, multi-type resource sharing and document delivery. The OWLS ROC has provided a coordinated interlibrary loan service, which permitted libraries of all types access to OCLC if they did not have access themselves. In addition, OWLS started a network of ARIEL workstations within its boundaries to facilitate the document delivery capabilities of the Region, as well as furthering its long range goal of using emerging technologies for the improvement of multi-type resource sharing.

In 1999 OWLS introduced the OWLS Regional Catalog. The OWLS regional catalog is a collection of library catalogs that you can search simultaneously. Currently the OWLS catalog uses Z39.50 technology to connect the collections of:



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- The Library Network Shared Library System(58 library buildings; 3.4 million volumes; 6.5 million annual circulation)
- Eastern Michigan University (890,000 volumes; 163,000 annual circulation)
- University of Michigan – Dearborn (317,000 volumes; 94,000 annual circulation)
- Baldwin Public Library (149,000 volumes; 368,000 annual circulation)
- Orion Township Public Library (101,000 volumes; 249,000 annual circulation)
- Schoolcraft College (94,000 volumes; 25,000 annual circulation)
- Bloomfield Township (214,000 volumes; 527,000 annual circulation)

**VI. Networking plan** - Relate the proposed project to the library networking plan of the Cooperative, Region of Cooperation, or other resource sharing organizations including specific information on multitype library participation in the area.

Each of the organizations participating in this project has a long and accomplished history of resource sharing. This history reflects each of our members' institutional commitment to resource sharing. This is perhaps typified by the comments of David Murphy, Director of the Walsh College Library:

Given the expected economic growth in our immediate area, Walsh College and particularly its two libraries are ready to supply information needs to any individual or company that looks for our help. We maintain an open-door policy; anyone may come in to use our facilities and ask for assistance finding information on any subject. We maintain 18 databases, which anyone is entitled to use. We have nearly 40,000 volumes, mostly in the areas of economics and business finance. Our librarians and technical staff are active in their professional associations and lend their experience to the services we offer.

A patron-initiated interlibrary loan system, such as is described elsewhere would be in tune with our philosophy of empowerment coming from knowledge. We want our collections in the hands of as many individuals as possible. Our hopes for a virtual information sphere for Troy would be enhanced greatly with this new initiative spearheaded by so many agencies. Building a system where the collections of every library in six counties in southeast Michigan would be at once a basis for a state-wide information network and the envy of other states across our nation.

Appended to this proposal are the technology plans for The Library Cooperative of Macomb and The Library Network, the OWLS Strategic Planning Retreat report and the DALNET Vision for the Next Generation Information Services and System. Each of these documents addresses the use of technology to meet the resource sharing needs of our patrons and is consistent with this proposed project.

**VII. Financial need** - Describe the financial needs of the library.

**Local resources** - Explain the local resources that will be used to assist with the project, such as funding, outreach, or technical support.

**Continuation** - Describe the plans to continue the project beyond the subgrant period. Include plans for funding, and if applicable, for the use of project evaluation in support of future funding.

Many elements of this project are already in place, having been funded directly by our member libraries and through previous grant projects. This project seeks funding for the one-time costs associated with creating the linkages necessary to connect disparate systems at a level sufficient to accommodate patron initiated interlibrary loan. Project participants are prepared to absorb ongoing costs related to software licensing and hardware maintenance. Each project participant already maintains substantial budgets in support of

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resource sharing initiatives. Assuming the success of this project, we do not see difficulties with ongoing costs. Reviewers should note that each consortia has an established history of resource sharing and of managing/supporting large multi-library automation systems.

Currently we are looking at the Universal Resource Sharing Application (URSA) provided by *epitech* as the software that will best meet our needs. The URSA product is modular and the vendor has provided us with pricing based on two phases of implementation. This grant requests the funds required for phase one. Phase two will only be required for libraries whose circulation exceeds 500,000 and interlibrary loans exceed 5000 annually. Phase two implementation is not required in order to meet our goals, however we do expect our larger partners will implement phase two once the first phase has been successful.

This project is a good example of the use of LSTA funds to provide start up support for a new application of technology to library services. Each consortia involved devotes considerable resources to collaborative initiatives. However, we simply do not have the funding resources for the up-front costs of this project. Two of the three major partners are library cooperatives who are currently in a flat funding situation do to the cap in cooperative funding in PA 89. The OWLS region of cooperation is in a reduced funding situation and DALNET members have just absorbed the costs of their new library system. In fact DALNET has already purchased the necessary software (estimated at over \$145,000) to participate in this project and only requires a server to allow it to interoperate with the OWLS system.

Each of the participant organizations will contribute substantial staff time to the development and implementation of this project. The combined management and technical expertise serves as tangible evidence of our commitment. In addition, each organization has committed to providing the staff resources necessary to promote the use of this tool to the public and provide training in both in library and remote use of this tool.

**VIII. Awareness - Describe how the target population will be made aware of the improved library service.**

We will use a combination of promotional materials and training to orient the public to this new service. We will start by asking each organization to determine a target population for this project. Implementation plans for each target population will be developed complete with training and promotional elements. Although we will work together on the look and feel of promotional materials, each organization will be responsible for developing the implementation plan that best suits its needs. Timelines will be coordinated so that our implementation plans are in tandem.

We will also coordinate press releases so that all parts of our service area are covered.

We will develop one common access point to the service and a common name (right now we are considering the Southeastern Michigan Inter Library Exchange, or SMILE).

<sup>1</sup>Measuring the Performance of Interlibrary Loan and Document Delivery Services, by Mary L. Jackson, ARL Access & Delivery Services Consultant (195, December 1997).

<sup>2</sup>A Spotlight on High-Performing ILL/DD Operations in Research Libraries, by Mary Jackson, ARL Access and Delivery Services Consultant (198, June 1998).

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**Project Objective**

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**Objective# 1** : To create the linkages necessary to allow for patron initiated interlibrary loan that would seamlessly integrate with local library systems and provide improved delivery of library materials.

**Project Activities:**

- Integration of the Library Cooperative of Macomb database with the OWLS Regional Virtual Catalog;
- Use of third party software to provide patron authentication, and integration of ILL requests with local library systems on both the OWLS and DALNET servers;
- Linkage of the OWLS server with the DALNET server;
- Improved delivery of physical materials (extending existing delivery to additional libraries).

**Budget for this Objective:**

Budget Category	Explanation	Amount Requested
	Provide supporting calculations, e. g., 1,000 brochures @ .03	
Technology	Software licensing for Library Cooperative of Macomb, The Library Network, Eastern Michigan University, University of Michigan Dearborn, Orion Public Library and Baldwin Public Library	\$ 83,150
Technology	Server for DALNET	\$ 35,000
Technology	Consulting for integration of Macomb and URSA (ILL interface) into OWLS	\$ 2,170
Professional Services	Delivery for for 3 institutions (156 stops X \$30/stop)	\$ 4,680
		Total \$ 125,000

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**Summary Budget for the LSTA Project**

<b>Budget Categories:</b>	<b>Amount:</b>
A. Communications	_____
B. Library Materials and Supplies	_____
C. Professional Services and Costs	<u>\$ 4,680</u>
D. Promotion and Outreach	_____
E. Technology	<u>\$ 120,320</u>
F. Training	_____
G. Miscellaneous	_____
<b>TOTAL</b>	<b>\$ <u>125,000</u></b>

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### **Timeline**

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Include a step-by-step chronological list of all project activities, including steps in the evaluation.

Month One:

- Announce grant award in local newspapers and library publications, including campus publications
- Review presently available hardware and software to determine purchasing requirements
- Convene Focus Groups (ILL Staff)
- Develop consensus on lending policies for all participating agencies

Month Two:

- Purchase hardware and software
- Gather pre-implementation data from participating libraries

Month Three:

- Develop PR pieces for the project: letting patrons and staff know what is happening
- Integrate the Library Cooperative of Macomb into the OWLS catalog

Month Four:

- Install new hardware

Month Five:

- Begin configuring software for all participating agencies

Month Six:

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

Month Seven:

- Participating libraries train public
- Begin patron use of the new software
- Monitor use of the system
- Evaluate and make corrections to any software problems
- Begin delivery service to additional libraries

Month Eight:

- Begin distributing patron surveys in each ILL item delivered
- Develop web based survey
- Evaluate and make corrections to any software problems

Month Nine:

- Continue monitoring use of the system
- Evaluate and make corrections to any software problems

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**Timeline**

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**Month Ten:**

- Develop and implement staff surveys for participating libraries
- Reconvene Focus Groups (ILL Staff)

**Month Eleven:**

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

**Month Twelve:**

- Get statistical reports from software
- Final narrative report
- Develop final evaluation report

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### **Evaluation**

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Include:

- (1) a description of what is to be measured;
- (2) data collection methodology;
- (3) target benchmarks used to determine success (quantifiable ways of measuring the impact of project objectives); and
- (4) a plan to share evaluation results.

1. Our evaluation process will begin with focus groups of ILL staff at the participating member libraries. The questions we will ask them will relate to their levels of comfort with the new system. First, we will identify issues of concern for them and secondly, how the system can be used in their current workflow.

2. Develop a survey in the form of a bookmark.

Ask the following questions:

- Have you used this service before?
- Was this service helpful to you? / Did this service meet your needs?
- Would you use this service again?
- How did you hear about this service?
- Did you use this service – from home, at the library, at work?
- Was this service easy to use?
- Did you receive the material you needed in a timely fashion?
- What would you suggest to make this service better?
- Comments

Other side of bookmark: explain the project, funding, groups involved.

Put this same survey on the same web page to initiate more responses

3. Develop another survey for the staff of the libraries that are involved in the project (both paper and web based):

Ask the following questions:

- Is this service helpful to your patrons? / Does this service meet their needs?
- Do your patrons use this service – at the library / at home / at work?
- Are patrons commenting favorably about the timeliness of delivery?
- What would you suggest to improve this service?
- Comments:

4. Meet with the ILL staff focus group again. Determine if we met their needs and their patrons needs. Does this system improve their workflow?

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### **Evaluation**

Reproduce as necessary

**5. Accumulate statistics from the software and participating libraries:**

- We expect that this project will show an increase in the number of ILL requests at each participating location of at least 10%.
- We expect that this project will show a decrease in the amount of staff time necessary to fill ILL requests
- We expect that this project will show a decrease in the cost per ILL, comparing pre-grant costs and post-grant costs
- We expect that this project will show a decrease in the amount of time it takes to get an ILL item to a patron
- We expect that this project will show a decrease in the participating libraries' OCLC costs

The results of this project will be reported to various library groups in Michigan, including the Michigan Library Association annual conference, Cooperative Directors, Council of Library Deans and Directors – ILL Committee, ACRL – ILL Discussion Group.





## Board Resolution Statement of Assurances

This is to certify that the (Legal Entity) OWLS Region of Cooperation

Governing Board passed a resolution at its meeting of (Date) May, 12, 2000 for (Name of library applicant) OWLS to become an applicant and participant in the Library Services and Technology Act (LSTA) contract/grants program administered by the Library of Michigan.

Note: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant I certify that the applicant:

1. Has the legal authority to apply for Federal assistance, and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project costs) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§ 4728-4763) relating to prescribed standards for merit systems for programs funded under one of the nineteen statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§ 1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794), which prohibits discrimination on the basis of disabilities; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§ 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse, (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§ 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. 290 dd-3 and 290 ee-3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. § 3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply with the provisions of the Hatch Act (5 U.S.C. §§ 1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§ 276a to 276a-7), the Copeland Act (40 U.S.C. § 276c and 18 U.S.C. §§ 874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§ 327-333), regarding labor standards for federally assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§ 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. § 7401 et seq.); (g) protection of underground sources of drinking water under the Safe

- Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§ 1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
  13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. 470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. 469a-1 et seq.).
  14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
  15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. 2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
  16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§ 4801 et seq.) which prohibits the use of lead based paint in construction or rehabilitation of residence structures.
  17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act of 1984, the Single Audit Act Amendments of 1996, and OMB Circular A-133.
  18. As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Sections 85.105 and 85.110-A. The applicant certifies that it and its principals;
    - (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
    - (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
    - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or Local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
    - (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or Local) terminated for cause or default; and
  19. As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 82, for persons entering into a grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:
    - (a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;
    - (b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;
    - (c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants, contracts under grants and cooperative agreements, and subcontracts) and that all subrecipients shall certify and disclose accordingly.
  20. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing this program.
  21. Will comply with the Americans with Disabilities Act, P.L. 101-336, which prohibits discrimination on the basis of disability.
  22. Will comply with all regulations, guidelines, and standards lawfully adopted under the above statutes by the United States Institute of Museum and Library Services.
  23. Will comply with all LSTA guidelines and regulations, and will ensure that LSTA funds will be used to supplement and not supplant local funds expended for library service purposes.
  24. Declares that all information presented in this LSTA subgrant application is truthful to the best of the knowledge of the undersigned. Proposals of applicants who knowingly present untruthful information will be rendered ineligible for funding.
- B. Where the applicant is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.

Library of Michigan FY 2001 LSTA Subgrant Application

The Applicant agrees that compliance with this Assurance constitutes a condition of continued receipt of Federal financial assistance, and that it is binding upon the applicant, its successors, transferees, and assignees for the period during which such assistance is provided. (All *four* signatures must be provided and dated.)

The Applicant understands that expenses for the approved project that are not covered by the LSTA award will be the responsibility of the Applicant Agency.

Kevin Brandon \_\_\_\_\_  
Board Chairperson Name (Type) Signature Date

A. Michael Deller \_\_\_\_\_  
Library Director (Type) Signature Date

Eileen M. Palmer \_\_\_\_\_  
Subgrant Administrator Name (Type) Signature Date

Lianne Clair \_\_\_\_\_  
Fiscal Agent Name (Type) Signature Date

**Subject: Letters of Support**

**Date: Tue, 25 Apr 2000 12:14:10 -0400 (EDT)**

**From: "Eileen M. Palmer" <empalmer@tln.lib.mi.us>**

**To: grantcom@tln.lib.mi.us**

We are in great shape for letters! So far we have received letters from:

Detroit Public  
Library Coop of Macomb  
Sterling Heights Public Library  
Mount Clemons Public Library  
Oakland County Library  
Eastern Michigan University  
Concordia College  
Royal Oak Public Library  
Detroit Institute of Arts  
Michigan Library Consortium  
Wayne State University  
Clinton-Macomb Public Library  
Macomb Community College  
University of Detroit Mercy  
John D. Dingell Medical Center  
Baldwin Public Library  
Oakland Community College  
The Library Network

I am expecting also to hear from Walsh College and University of Michigan  
- Dearborn.

These are all terrific, thoughtful letters. Please thank your  
participating libraries. I can't imagine LM has ever received such a  
large number of support letters from such a wide range of institutions.

The deadline for any additional letters is 9am tomorrow morning. I will  
be at a meeting tomorrow so if you need to fax a letter then please call  
Irene Bakowski and alert her that it is coming (734-281-3830 ext. 146).

Thanks again!

-eileen

---

Eileen M. Palmer	Deputy Director for Member Services
The Library Network	empalmer@tln.lib.mi.us
13331 Reeck Road	tel: (734) 281-3830 ext. 107
Southgate, MI 48195	fax: (734) 281-1905

**Appendix A**

**Project schematic**

**Appendix B**

***epixtech* quotation**

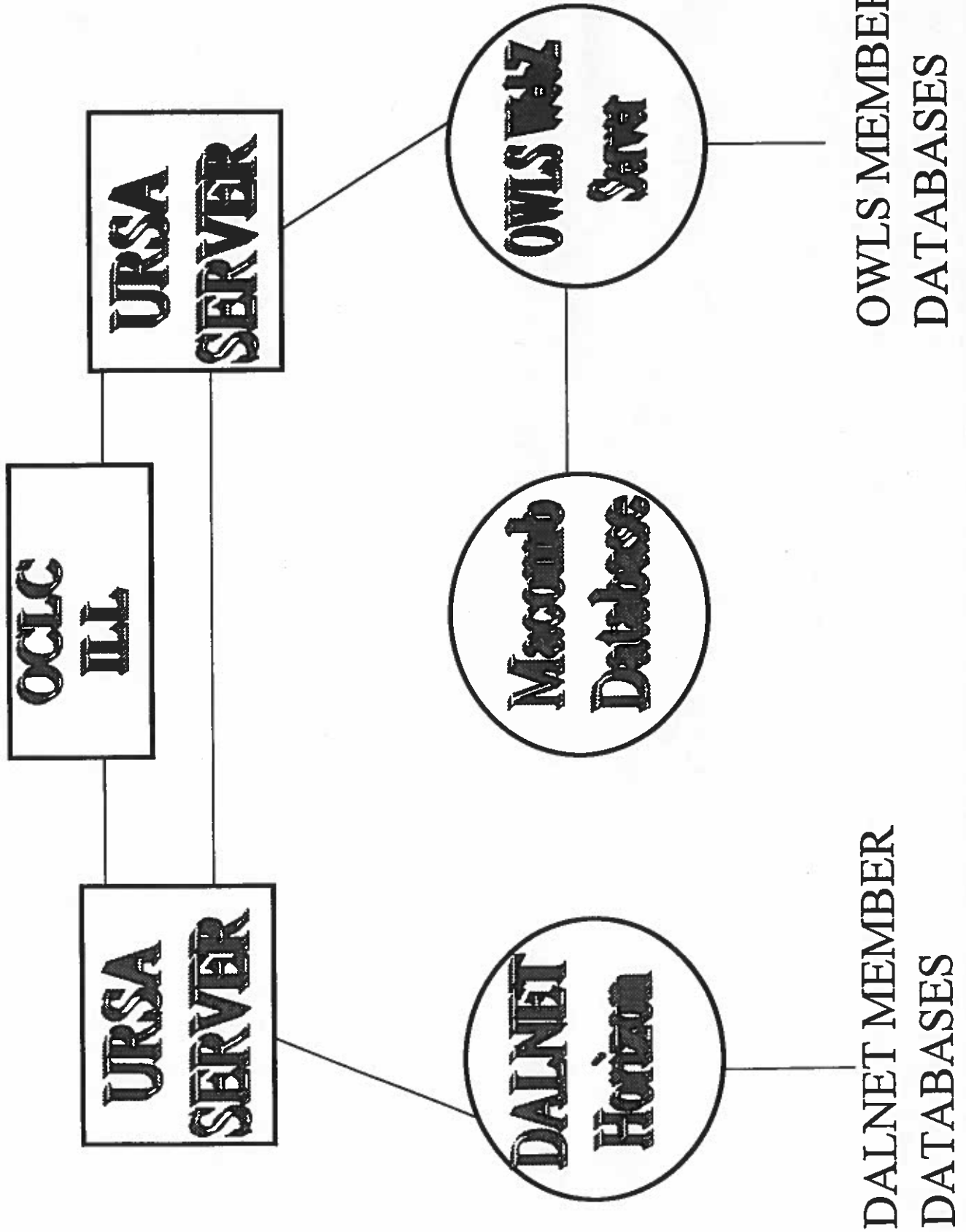
**Appendix C**

**Letters of support**

**Appendix D**

**Planning Documents**

APPENDIX A





Louise Bugg  
 Director of Technical Services & Systems  
 University Libraries - Wayne State University  
 Director of DALNET Online System

April 19, 2000

Dear Louise:

Epixtech is pleased to submit the following price estimates for a resource sharing system that would serve the DALNET, OWLS and Macomb libraries. These estimates are provided for budgetary planning purposes only and are subject to change.

As you know, epixtech currently has two options for providing virtual catalog and resource sharing capabilities. Hopefully Gail Wanner's recent visit provided you with a good overview of both the RSS and URSA products.

It is my understanding that you wish to use the pricing information that we have provided to apply for LSTA grant funding that would be available to you later this year. I am sure that Gail provided you with an overview of our plans for combining RSS and URSA into a next generation product to be made available about the time you would be implementing your system. With that timing in mind, what we have provided includes our best estimates of the costs for epixtech's resource sharing product in that time frame.

When we discussed your needs in this area, you indicated that you would like to have estimates for both RSS and URSA but you were hoping that you could submit the grant without having to decide which product you would utilize. Epixtech is providing pricing would be the same regardless of which product you decided to utilize.

#### Library Assumptions

The estimates provided have utilized the information supplied by each consortium. These assumptions are summarized in the following table:

Library	Locations	ILS Vendor	Annual Circ.	Annual ILL	Notes
OWLS	63		7,928,721	33,905	
U of M - Dearborn	1	Innovative	93,583	5,190	WebZ
Baldwin Public	1	Endeavor	368,114	1,635	WebZ
Eastern Michigan U	1	Endeavor	163,444	2,497	WebZ
The Library Network	57	DRA	6,503,010	22,000	WebZ - Total System
Orion Township PL	1	Dynix	248,794	1,206	WebZ
Schoolcraft College	1	Dynix	25,085	72	WebZ
Bloomfield Township	1	Innovative	526,691	1,305	WebZ
DALNET	67	Horizon	2,766,916	95,394	15 Separate Horizon Systems
Macomb	27	Dynix	3,500,000	6,000	



## **Functionality Assumptions**

The estimates provided assume that the following capabilities will be provided.

### **Phase 1: (All functionality will be provided for DALNET, OWLS and LCM unless otherwise noted).**

- Virtual Catalog that includes broadcast searching of the catalogs in OWLS, DALNET and Library Cooperative of Macomb.
- Authenticated patron access (using local patron data) that will allow searching, requesting and review of request status via any standard browser using the Internet. If epixtech's patron authentication product (RPA) is purchased, this would also be integrated with the resource sharing authentication to allow patrons to access resource sharing services as well as on line database services (e.g. UMI, EBSCO, etc.) with a single authentication step. Prices for RPA are not included in these estimates.
- Unmediated processing of patron requests at borrowing library. Each library has the option to have lender strings constructed automatically or have staff review and select lenders.
- Support of ISO standard protocol to enable sending and receiving requests to other libraries outside the participating consortia. This will also enable sending and receiving requests to intermediaries supporting this protocol such as OCLC.
- Integration of ILL management module with WEBZ searching module for OWLS and LCM.
- Extended circulation option for DALNET libraries that perform more than 5,000 ILL transactions annually. This interfaces the ILL management system with local automation system to reduce or eliminate staff time by automatically placing holds and checking item out in lender system. Will also create "on the fly" records in borrowing system to enable more efficient processing of items borrowed from other libraries.
- Automatic lender selection that utilizes the circulation status of potential suppliers. This will optimize the requesting process resulting in increased fill rates by lenders. This option has been included for DALNET libraries with collections or annual circulation exceeding 500,000.
- Services that include the configuration of catalogs, libraries and integration with local systems as necessary. Some setup by local staff may be required to configure specific parameters such as addresses, staff users, and configuration preferences.
- On site training session for staff users and administrators. One session for DALNET and one session for OWLS and LCM combined.

### **Phase 2: (Following additions for OWLS and LCM libraries).**

- Automatic lender selection that utilizes the circulation status of potential suppliers. This will optimize the requesting process resulting in increased fill rates by lenders. This option has been included for those libraries with collections or annual circulation exceeding 500,000.
- Extended circulation options added for libraries in OWLS and LCM. This has been included for libraries that perform more than 5,000 ILL transactions annually.

## DALNET

The DALNET consortium has an existing contract for the RSS software. Epixtech will work with DALNET staff to determine which product (RSS or URSA) better meets the needs of DALNET for initial installation in 2000 and future expansion to include the Library Cooperative of Macomb and the OWLS region of cooperation. If it is determined that URSA is a more appropriate solution, epixtech will provide the functionality, as described above for the prices as currently defined in the contract for the RSS software.

## Library Cooperative of Macomb and OWLS

The following costs would be required to add the members of the Library Cooperative of Macomb (LCM) and OWLS. These costs would include the necessary software license and service fees as well as hardware for servers. Assumptions made in this pricing:

- Functionality provided would be as described above.
- It is assumed Macomb and OWLS will both be trained in single training session. The cost has been split between each consortium.
- This cost assumes that the current OWLS server hosting WEBZ will serve both LCM and OWLS patron searching requirements. Costs also include integration of WEBZ with ILL management system to accept requests from WEBZ.

### **Library Cooperative of Macomb**

	<b>Library Systems</b>	<b>Additional Locations</b>	<b>Extended Circ.</b>	<b>Request Filter</b>	<b>Onetime License</b>
Macomb Phase 1	1	26	0	0	\$27,700
Macomb Phase 2	0	0	1	1	\$10,000
<b>Total</b>	<b>1</b>	<b>26</b>	<b>0</b>	<b>0</b>	<b>\$37,700</b>

### **OWLS Libraries**

	<b>Library Systems</b>	<b>Additional Locations</b>	<b>Extended Circ.</b>	<b>Request Filter</b>	<b>Onetime License</b>
OWLS Phase 1	7	56	0	0	\$55,450
OWLS Phase 2	0	0	2	3	\$35,000
<b>Total</b>	<b>4</b>	<b>56</b>	<b>2</b>	<b>3</b>	<b>\$90,450</b>

### Summary of One time Software Costs by Phase

	<b>Phase 1</b>	<b>Phase 2</b>	<b>Total</b>
DALNET	Per Existing Contract	Per Existing Contract	Per Existing Contract
OWLS	\$55,450	\$35,000	\$90,450
Macomb	\$27,700	\$10,000	\$37,700
<b>Total</b>	<b>\$83,150</b>	<b>\$45,000</b>	<b>\$128,150</b>

## Hardware

Hardware costs may vary depending on the implementation approach to be taken in this project. The costs below assume that a UNIX system will be utilized. When both phases are fully implemented and in production for all libraries it is estimated that two servers would be required. One server would accommodate the DALNET consortia and a second would serve OWLS and LCM. The exact utilization and configuration would be determined as part of the implementation planning.

A Sun Enterprise 450 would be the typical choice for the DALNET consortia. This would support all DALNET patron usage, perform ILL management functions and hold a database of transaction data. It is assumed this could also accommodate the ILL management workload of OWLS and LCM.

The current OWLS WEBZ server will accommodate the patron searching workload for both OWLS and LCM libraries and will be linked to the DALNET server to enable the management of OWLS and LCM ILL transactions.

Expanded usage could require an upgrade of the DALNET server for additional processing power. This also dictates expanding the license for the Database module utilized by the ILL management system.

	Phase 1	Phase 2	Total
SUN E450, 1CPU	\$35,000		\$ 35,000
2 <sup>nd</sup> CPU, Additional Memory		\$5,000	\$5,000
Upgrade Database License		\$6,000	\$6,000
<b>Totals</b>	<b>\$35,000</b>	<b>\$ 11,000</b>	<b>\$ 46,000</b>

## Annual Fees

The following table estimates the annual fees that would be applicable for the software and hardware described above. Annual software fees are not applicable in the first year of operation.

	Year 1	Year 2	Year 3
DALNET	\$0	Per Existing Contract	Per Existing Contract
OWLS	\$0	\$9,630	\$14,880
Macomb	\$0	\$5,468	\$6,968
Hardware & DBMS	\$6,374	\$8,304	\$8,304
<b>Total</b>	<b>\$6,374</b>	<b>\$23,402</b>	<b>\$30,152</b>

Louise, I hope the information provided here is sufficient for your grant submission. If you have further questions please don't hesitate to call either Bill Easton or myself.

Regards

John Wardell  
Resource Sharing Product Specialist for Epixtech, Inc.  
CPS Systems, Inc.

Bill Easton  
Midwest Regional Sales Manager  
Epixtech, Inc.

CC: Eileen Palmer  
Deputy Director for Member Services  
The Library Network

Tammy Turgeon  
Director  
Library Cooperative of Macomb



# BALDWIN PUBLIC LIBRARY

300 West Merrill • P.O. Box 3002 • Birmingham, Michigan 48012-3002  
(248) 647-1700 • Office (248) 647-7339 • Fax (248) 647-6393

## APPENDIX C

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, Michigan 48909

24 April 2000

Dear LSTA Team:

This letter is in support of the OWLS LSTA Grant Request for \$125,000 to integrate the Library Cooperative of Macomb into the OWLS regional catalog; to establish a Universal Resource Sharing Application server; to allow authenticated patron initiated requests; to link the OWLS/Macomb URSA server to DALNET to link all three consortiums; and to provide some additional delivery linkages between OWLS, DALNET and Macomb.

Better urban, regional and statewide cooperation and networking among Michigan libraries will be met by this grant as it will provide library clients in southeastern Michigan with easy and timely access to a unified and expanded set of resources to meet the growing demand for items not held by the home library.


Baldwin Public Library has been part of the original pilot for the OWLS Regional Catalog and has seen from first hand experience how this interconnectivity with other libraries has benefited its clientele. The regional catalog has proven to be a cost effective and productive means to meet the demands of patrons.

Building upon the success of the OWLS regional catalog is a logical step. To have found two willing partners with similar interests and desires to further the Z39.50 initiative has been extremely fortunate. With its success, there is potential for this model to be extended throughout Michigan to connect the entire state.

I urge you to support this grant application to provide the southeastern Michigan region, a major population and business center, with a streamlined, online, ILL requesting and responding process which can then be the beginning formation of an information hub for the state of Michigan.

Thank you for your consideration.

Sincerely,

  
Leslie L. Kee  
Director

*For a better quality of life . . . serving Beverly Hills, Bingham Farms and Birmingham*



43245 Garfield Road • Clinton Township, Michigan 48038-1115 USA  
(810) 226-5000 • (810) 226-5008 - fax  
www.cmpl.org

# Memo

Date: April 18, 2000  
To: LSTA Review Committee  
From: Christine Lind Hage, Director *C. Hage*  
RE: OWLS/DALNET/Macomb Grant Application

I am writing to request that you fund the joint grant request submitted by OWLS, DALNET, and the Library Cooperative of Macomb. This joint project will provide a valuable resource to the millions of people who live in southeast Michigan.

In many ways we share customers. People live in one county, but work in another. People travel from community to community and sometimes aren't even aware that they cross county or cooperative boundaries. The Z39.5 project will help make the library jurisdictional boundaries as invisible to our customers.

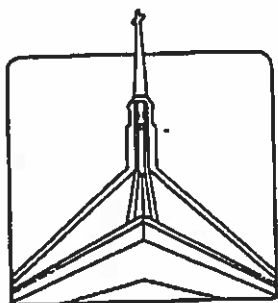
The success that OWLS has already experienced with their project in the last year, offers the great promise of a wider net of resources being available to first people in the six county southeast Michigan area and possibly on a statewide basis in the future. With our shared epixtech automation system our customers will be able to access the resources they need from special, academic and other public libraries outside our cooperative.

The neat feature that this grant offers is not just locating resources, but enabling people to interloan materials. It will empower our customers to help themselves to the resources beyond our walls, beyond our county and beyond our cooperative.

The Clinton-Macomb Public Library wants to provide equal access to library service and information from womb to tomb to the over 100,000 people that live in our library service area. Our own resources, although growing, are very limited. This grant request will greatly enhance the service and resources we currently offer.

I urge you to fund this innovative and important project!

Donald W. Green, Chairperson • Robert Anderson, Trustee • Elizabeth Bartlett, Vice-Chairperson • Barbara Brown, Treasurer  
4/18/00 Morsha LaBuhn, Trustee • Peg Lamont, Secretary • Michael Lotito, Trustee • Barbara Towner, Trustee  
Christine Lind Hage, Library Director



Christ first in everything

**Concordia College**  
4090 Geddes Road  
Ann Arbor, Michigan 48105  
(313) 995-7300

Library

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The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, MI 48909

Greetings;

I am writing in support of the OWLS/ DALNET / Macomb County Libraries LSTA grant project.

Concordia College's Zimmerman Library has been a partner in several multi-type library shared projects. Our community has benefited greatly from the opportunities to search the OWLS catalog to identify and locate materials and information held by participating libraries in southeastern Michigan. We look forward to the next step, patron initiated interlibrary loan.

Concordia College has been a leader in adult and continuing education in Michigan for nearly twenty years. Concordia College had the first Adult B.A. completion program in the state. Concordia College has many adult students who commute to our campus from as far away as Detroit, Oak Park, Royal Oak, Utica, Northville, Brighton, and other Detroit suburbs. These students have greatly benefited from the OWLS regional catalog. Many of these students are single parents who are trying to prepare for better jobs through adult education. The Catalog provides them opportunities to look for books and journals from any location (home, work, public library) with access to the Internet. They have told me that this technology is such a great blessing because it frees up time to be with their children and for parenting activities that they might otherwise spend on the road commuting to do their research. They enjoy being able to go to their local public library and request materials through interloan services. Many of them tell me the benefit of the truck delivery of materials to their local library is wonderful.

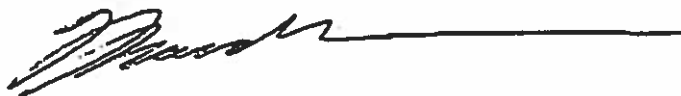
With the success of the regional catalog and delivery, it is our hope that these same clients can soon begin to directly place requests into the regional system from the catalog. This along with additional benefit of including a larger number of participating libraries would only increase these same benefits to a larger community of Michigan citizens. The proposed project before you will not only open more libraries' collections, not only allow for the client or patron to request their materials directly, but will allow the participants to begin working across regions and networks. A great opportunity to begin looking at what

works on a larger scale, systematically between organizations, between institutions with different missions with shared clientele, and interactively between people and technology.

As the current chair of OWLS, I support the project as a great opportunity to build upon the existing and successful OWLS catalog project by taking the project to the next step, seamless interlibrary loan. With the investment of time, money, and human resources already invested in OWLS, I hope that we are given the opportunity to capitalize the great investment already in place.

Thank you for considering this project for the benefit of Michigan citizens of all ages, avocations, and needs.

Sincerely;



Kevin Brandon, Director of Library Services  
OWLS Board Chair

*April 24, 2000*





DEPARTMENT OF VETERANS AFFAIRS  
John D. Dingell Medical Center  
4646 John R  
Detroit, MI 48201-1932

DATE April 20, 2000

In Reply Refer To: 553/001R-I

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, MI 48909

Dear Sir/Madam:

I am writing in support of the LSTA request from the DALNET/OWLS/Macomb Grant application. As Administrative Librarian at the John D. Dingell VA Medical Center, I can see benefits for both our health care staff and our veteran patients.

The benefit to our patrons is time saved and productivity at the work site. The result will be a streamlined, online ILL process which will result in quicker receipt of the material for the user. The goals of this project are consistent with the mission statements of the participating consortia and each of the individual libraries: to provide for educational and life-long learning opportunities, to assist adult learners and to benefit society by making knowledge available for the improvement of the human condition. This is particularly important in health care for our citizens.

As a member of the DALNET Board of Directors, I feel this project is a model that can be extended throughout Michigan to connect the entire state and create a major educational and economic infrastructure. I know you will give serious consideration to this proposal.

Sincerely,

A handwritten signature in cursive script that reads "Karen M. Tubolino".

Karen M. Tubolino  
Administrative Librarian



## THE DETROIT INSTITUTE OF ARTS

April 20, 2000

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, MI 48909

Dear LSTA Team:

This letter is in strong support of the LSTA grant proposing a collaborative effort between the Detroit Area Library Network (DALNET); Oakland, Wayne, Washtenaw, Livingston, St. Clair (OWLS) Cooperative; and the library cooperative of Macomb.

The Detroit Institute of Arts Research Library is a highly specialized fine art research library. As such, our collection goals are primarily formulated to assist the research needs of the museum's curatorial staff. However, the DIA Research Library recognizes a very important secondary goal as a resource for the surrounding community of scholars and researchers. The mission statement of our library stresses a strong commitment to fulfilling the art historical research needs of our community and we feel this LSTA grant can assist us greatly toward this goal. Seamless, consortial searching and interlibrary loan capabilities represent a large step towards the end goal of effortless statewide connectivity and information sharing.

The DIA Research Library is committed to the consortial objectives of DALNET and strongly supports this LSTA grant initiative that would greatly enhance multi-type library collaborative efforts in the State of Michigan.

Please feel free to contact us at the Research Library should you have any questions or concerns.

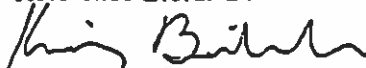
Sincerely,



Jennifer U.S. Moldwin  
Head Librarian



Mary Galvin  
Reference Librarian



Kraig A. Binkowski  
Technical Services Librarian

## DETROIT PUBLIC LIBRARY

5201 WOODWARD AVENUE, DETROIT, MICHIGAN 48202 313/833.1000

MAURICE B. WHEELER, Ph. D. Director

April 25, 2000

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, MI 48909

To Whom It May Concern:

Library users in Southeast Michigan need the best available resources. Detroit Public Library is always eager to identify collaborative relationships that allow the state's largest public library system to meet the increasing demands of our customers for improved access to materials. It is for that reason that I am writing in support of OWLS/DALNET/Grant Request for LSCA funds from the Library of Michigan.

This grant will allow DALNET, of which DPL is a member, and the Library Cooperative of Macomb to join the OWLS (Oakland, Wayne, Livingston, St. Clair) Z39.50 project, establishing customer-powered automated interlibrary loan access. Our customers will be able to more efficiently access the library collections through an online interlibrary loan system.

The grant request will allow the three consortia to take advantage of a technology that will immediately enhance our ability to serve our diverse customers. I strongly endorse this grant request and look forward to working with DALNET, OWLS and the Library Cooperative of Macomb to ensure its implementation.

Yours for libraries,



Maurice B. Wheeler, Ph.D.  
Director

/as

**DETROIT PUBLIC SCHOOLS**

**PROFESSIONAL LIBRARY**  
Office of Resource Analysis and Development  
Department of Strategic Planning and Resource Analysis  
Division of Executive Services  
5057 Woodward Avenue, Suite 869  
Detroit, Michigan 48202  
Voice: (313) 494-1626  
Fax: (313) 494-1627  
E-mail: jerome\_shepard@detroit.k12.mi.us

25 April 2000

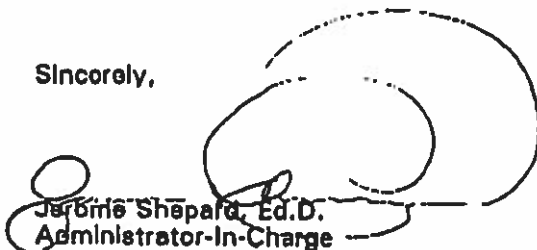
Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan St.  
Lansing, MI 48909

Gentlepersons:

This Letter of Support is being provided relative to the Detroit Area Libraries Network (DALNET) application for a FY2001 LSTA grant, which purposes to create a collaborative among the Oakland, Wayne, Washtenaw, Livingston, and St. Clair consortiums; and the Library Cooperative of Macomb (OWLS).

The young people within our municipality will be among the prime beneficiaries of a broad Internet-based computer library system, such as that proposed by the OWLS Collaborative. Staff and students will be able to interface with the libraries outside of the DALNET consortium, and reciprocate to other communities in sharing our online resources. A residual benefit to the proposed OWLS cooperative involves the standardization of the delivery system for research resources and references throughout southeast Michigan; while providing a vehicle which promotes the continuity of access from a K-12 educational environment throughout the higher education experience, and beyond.

Sincerely,



Jerome Shepard, Ed.D.  
Administrator-In-Charge

c: Director, Office of Resource Analysis and Development  
File



April 24, 2000

The Librarian of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan St.  
Lansing, MI 48909

To Whom it May Concern:

I am pleased to write a letter in support of the LSTA proposal to integrate the Library Cooperative of Macomb into the OWLS catalog and to establish a universal resource sharing application server to allow authenticated patron initiated interlibrary loan requests. This will also provide some additional delivery linkages between OWLS, DALNET and Macomb. It will improve the database now available to OWLS members in general, and to Eastern Michigan University in particular. We are very much in support of patron initiated interlibrary lending, and this grant will enhance our ability to provide this for our students and faculty.

Through the use of the Z39.50 technology, several disparate automated library systems can be seamlessly linked, thereby making the system easy to use for all participants. Public, academic and special libraries across six counties will participate. While Z39.50 gives us a seamless linkage, the epixtech software, also to be purchased through this grant, will manage ILL request administration and messaging between libraries.

As members of the OWLS group which pioneered this project, we feel strongly that this enhancement to our group will significantly improve access and delivery of information to our patrons at Eastern Michigan University. We urge you to fund this project.

Sincerely yours,

A handwritten signature in cursive script that reads 'Sandra Yee'.

Sandra Yee  
Department Head, University Library

LEARNING, RESOURCES AND TECHNOLOGIES

300 East Main Library • 955 West Circle Drive • Ypsilanti, Michigan 48197  
Tel: 313.487.1150 Fax: 313.484.1151 URL: <http://www.emich.edu/hall/>



# Library Cooperative of Macomb

16480 HALL ROAD • CLINTON TOWNSHIP • MICHIGAN • 48038-1132 • (810) 286-6750 • FAX (810) 286-8951

Tammy L. Turgeon  
Director

April 25, 2000

Library of Michigan  
LSTA Grant Review Committee  
P.O. Box 30007  
717 West Allegan Street  
Lansing, MI 48909-7507

To LSTA Team:

The Library Cooperative of Macomb enthusiastically supports the OWLS / DALNET / LCM proposed project to create a union catalog and ILL system across southeastern Michigan.

If this project is funded, it will provide all of our patrons, many of which are shared, with a single interface to all of our resources and the ability to request those resources that they need. We will accomplish this through the use of Z39.50 technology and ILL software that will be integrated into each of our automation systems. These linkages are so important to making libraries more user friendly for our patrons, whether they are in the library, at home, or at work.

The benefits that this project would provide to our patrons are: increased access to our collective resources, the ability to fill their information needs quickly, and a seamless interface that can be used anywhere/anytime. This will result in the increased productivity of our citizens.

The libraries in southeastern Michigan serve approximately 50% of the citizens in the entire state. This project will likely have an enormous impact on the way libraries are used in this state, and will hopefully lead to larger projects in the future.

Sincerely,

Tammy L. Turgeon



Connections for the Information Age

13331 Reeck Road, Southgate, MI 48195-3054 • Phone (734) 281-3830 • Fax (734) 281-1905

April 24, 2000

TO: The Library of Michigan – LSTA Team

FROM: A. Michael Deller, Director

RE: Collaborative Grant Application- OWLS/DALNET/Macomb

The greater the size of a library collection, the more likely it is that a person will find material to support the topic they are researching. The concept of union catalogs has long recognized that libraries working together could create access to a "larger collection." Using technology has opened new avenues of access. The diversity of paths that technology has chosen to create library automation appeared to work against ease of access. Some insisted that a single system manufactured by a single vendor was a necessity.

The Z39.50 standard has the promise of joining diverse systems, which individually have required large amounts of capital investment. This project proposes testing the scalability of a model that works well for one region of cooperation. The addition of two other large systems to the existing one in a population-rich area would test how well the software design would function when it handles far more transactions.

Presuming that the test shows that the software design can grow exponentially, and still operate satisfactorily, the project will provide a tested model that will serve a whole state, without major changes in library hardware and software already in place at local library buildings. Key to the project is patron initiated inter-library loan, which promises an efficiency needed at all of the cooperating libraries.

The Library Network (TLN) has supported the OWLS project that makes this proposal possible. The Library Network sees great advantages for area residents in expanding the scope of cooperation as proposed in this OWLS/DALNET/ Library Cooperative of Macomb grant application. TLN supports this grant application and joins The Library Cooperative of Macomb and DALNET in promising its resources to assure successful completion of the project goals.



The Library of Michigan  
LSCA Team  
P. O. Box 30007  
717 West Allegan Street  
Lansing, Michigan 48909-7507

April 19, 2000

To Whom It May Concern:

This letter is written in support of the OWLS / DALNET / Macomb Grant Request for LSCA funds from the Library of Michigan.

The Oakland, Wayne, Washtenaw, Livingston, St. Clair Library Cooperative (OWLS) has developed a working model for the use of Z39.50 technology which offers a seamless interface between disparate library systems so as to provide information locations to monographs. The Detroit Area Library Network (DALNET) and the Library Cooperative of Macomb wish to join in the OWLS Z39.50 project and to expand upon it.

The purpose of the grant request is to provide library users in southeastern Michigan with unified resources and to empower these users to access regional library resources when they need them. The intent is to connect the three consortia using Z39.50 Internet technology and to offer automated, patron empowered, interlibrary loan access.

If funded, this grant will establish and enhance electronic linkage among local and regional libraries. It will provide a hub for a statewide Michigan library network. Further, upon implementation this grant will allow Michigan library consortia to share resources and to lower the cost of sharing. The grant will also expand on regional cooperation among all types of libraries because of the mix of libraries in the OWLS / DALNET / Macomb consortia.

The libraries located in the southeastern Michigan region often share the same patrons. These patrons are engaged in the pursuits of making a living, raising families, and becoming more educated. In trying to increase their productivity, today's adult learners have multiple learning needs which require efficient access to information. These users must have better urban, regional and statewide library cooperation to get the information they require in a timely manner.

Consequently, the libraries in the three participating consortia need to be connected using Z39.50 technology so that information can be located efficiently. In addition, an automated, patron empowered, interlibrary loan system needs to be adopting to standardize the application among patrons in the region, if not the State.



Public, academic and special libraries from seven major Michigan counties can be expected to participate in this project. The southeastern Michigan region is the major population and cultural center of the State. A successful implementation would set a pattern for the entire State. More importantly, a successful result would reinforce the need to network in order to create an informational infrastructure that will support business, industry and education in Michigan.

The benefit to our mutual patrons and the people of Michigan is time saved, cost effective delivery and productivity at home, at school, and at work.

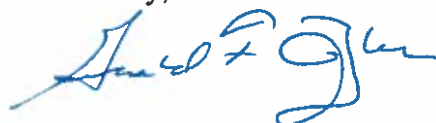
As Macomb Community College Libraries try to serve their primary clientele, close inspection finds a broad base of users. MCC Libraries service MCC students as well as students from all colleges and universities in its University Partnership Program. This includes students enrolled at: Central Michigan University, Detroit College of Business, Ferris State University, Oakland University, Rochester College, the University of Detroit Mercy, Walsh College, Wayne State University and the University of Michigan.

Because of the College mission to serve life long learners, MCC Libraries must look to serve the local community as well. In doing so the college libraries must work closely with the public library sector because none of them can afford to purchase all the information that is currently available. They need to depend on each other to service their patrons. Yet, because of the variety of automated library systems, the public and academic libraries are not effectively connected. Both library professionals and the general public find the different online library systems owned by public and academic libraries cumbersome to use because they are unfamiliar with them. Z39.50 Internet technology can change that. Funding of this grant will connect public and academic libraries seamlessly, allowing them to work more closely together to fulfill and to stimulate the intellectual needs of the people they serve.

This grant request is exciting because it represents three consortia that are ready to collaborate with technology that is ready to go. It's not a dream or a plan for some time in the future. It will help people now.

Macomb Community College Libraries strongly endorse this grant and recommend it in the highest terms for funding by the Library of Michigan.

Sincerely,

A handwritten signature in blue ink, appearing to read "Gerald F. Bosler".

Gerald F. Bosler  
Public Services Librarian  
DALNET Vice Chair



# MICHIGAN LIBRARY

C O N S O R T I U M

April 24, 2000

Ms. Eileen Palmer  
Deputy Director for Member Services  
The Library Network  
13331 Reeck Road  
Southgate, MI 48195

Dear Eileen:

I am pleased to offer my support for the OWLS LSTA grant request for the Z39.50 Patron Empowerment project. This project, a cooperative venture of multitype libraries that allows library patrons to use the Web to search remote library catalogs and place requests for materials, would be an exciting leap forward for library patrons in southeastern Michigan. In addition, this service, once deployed, may hold the potential for expanding to a statewide union catalog and interlibrary loan system.

The Michigan Library Consortium (MLC) has a strong and ongoing commitment to improved access to information resources for all Michigan residents. MLC has been actively involved with many statewide and regional initiatives in its twenty-five year history. In one of our recent projects, MLC played a developmental and consulting role to OWLS as they developed the virtual union catalog system that this grant proposal builds upon. We are excited at the prospect of continuing our work with OWLS, especially on a project such as this that may have implications for enhancing statewide information delivery services.

MLC is ready to support this effort in every way possible and applauds OWLS for leading us forward on this important issue.

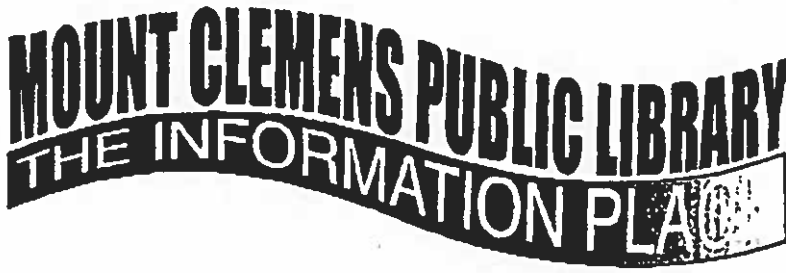
Sincerely,

Randy Dykhuis  
Executive Director

C 14 of 25

6810 South Cedar Street, Suite 8, Lansing, MI 48911-6909

Phone 517-497-1212 Fax 517-497-9303



150 CASS AVENUE  
MOUNT CLEMENS, MICHIGAN 48043-2297

PHONE 810-469-6200  
FAX NO. 810-469-6668

DONALD E. WORRELL, JR., DIRECTOR  
DEBORAH J. LARSEN, ASSISTANT DIRECTOR

[http:// www.libcoop.net/mountclemens](http://www.libcoop.net/mountclemens)

BOOKS, MAGAZINES, NEWSPAPERS, VIDEOS, RECORDINGS, MICROFILM, COMPUTERIZED INFORMATION SERVICES

April 20, 2000

To whom it may concern:

Mount Clemens Public Library supports the proposed project of the Library Cooperative of Macomb, DALNET, and The Library Network to create a shared catalog among libraries in southeastern lower Michigan.

As technology advances, our library patrons expect and deserve better access to library materials across the region. The current patchwork of library systems is a hindrance to providing timely access to information and interlibrary loan service.

We wholeheartedly support the proposal to enhance the existing Z39.50 model currently in use by OWLS to provide a regional catalog and interlibrary loan system for all types of libraries across the six county area.

Very truly yours,

A handwritten signature in black ink, appearing to read "D. Worrell, Jr.", is written over a horizontal line.

Donald E. Worrell, Jr.  
Library Director



OAKLAND  
COMMUNITY  
COLLEGE

Orchard Ridge Campus  
27055 Orchard Lake Road, Farmington Hills, MI 48334-4579

(248) 522-3400

Fax: (248) 522-3429

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, Michigan  
48909

April 19, 2000

To Whom It May Concern,

I am writing in support of the proposed LSTA grant for including DALNET with other existing libraries and networks into the OWLS union catalog. The prospects of using Z39.50 connectivity and expanding abilities to do document delivery would mean a tremendous leap forward in our abilities to provide services to our patrons. I work on the Reference Desk at Oakland Community College and can attest that our students often request items that we do not have in our own local collection. In those cases, rather than having to search in many individual online catalogs, a time-consuming and sometimes discouraging process, it would be wonderful to be able to do one search that would quickly scan the holdings of the majority of area libraries. I have used the existing OWLS catalog to partially fulfill this need and am eager to include our DALNET libraries in such a system.

Providing interlibrary loan that can be initiated directly by the patron through this unified catalog would also speed and expedite the process of getting materials to students. Also, OCC is participating in the Michigan Community College Virtual Learning Collaborative and will be expanding the number of distance education courses offered throughout Michigan. A unified catalog would greatly assist students who are taking courses off-campus and need to locate resources while at home.

Thank you for your consideration,

Ann Walaskay, Librarian  
King Library, Orchard Ridge Campus  
Oakland Community College  
27055 Orchard Lake Rd.  
Farmington Hills, MI  
48334

---

**Oakland County Library**  
1200 N Telegraph Road - Dept 481  
Pontiac MI 48341-0481  
248/858-0380  
Fax: 248/452-9145

April 21, 2000

Library of Michigan  
LSTA Team  
P O Box 30007  
717 W Allegan Street  
Lansing MI 48909

To Whom It May Concern:

It is with great enthusiasm and a spirit of continuing commitment to the advancement of library services that I support the OWLS/DALNET/Library Cooperative of Macomb LSTA grant application in the General Technology category.

In some ways I feel like I am the spark behind this grant application. As a member of the OWLS Board of Directors (and participant in the OWLS Regional Catalog program) I know first hand the benefits of a regional catalog. As Chair of the DALNET Board of Directors, I saw the natural extension of this regional catalog to the next level. I suggested that the two groups meet to discuss the possibility of expanding the OWLS project to include DALNET. The addition of the Library Cooperative of Macomb expands the horizon and increases the value. Speaking as the County Librarian for Oakland County, a link with the public libraries in Macomb is something we have long wished for. Traffic patterns - work & educational - have substantiated the need.

If libraries are to step to center stage in this age of technology, we need to provide our patrons with access to the most sophisticated technology possible. People move seamlessly throughout the metropolitan area - and library services need to reflect that fluidity. Patrons need to find out if the information is available and how it can be secured - with the least time, effort and cost involved.

As noted in the application, libraries participating in this project serve more than 40% of the state's population. Initiating this project will put us well on the road towards a state wide program for increased access for our patrons.

LSTA Team  
Page 2  
April 21, 2000

My excitement and anticipation of the OWLS Regional Catalog project was rewarded with a result that exceeded even my expectations. I stand in awe of its success and impact. As a member of the OWLS Board of Directors, as Chair of the DALNET Board of Directors and as the Oakland County Librarian, I am committed to take this concept to the next step - both improving the quality of service we provide AND keeping libraries relevant and recognized as technology evolves and encompasses our society.

Know that your favorable consideration of this application will create a new matrix for library services in the metropolitan Detroit area, allowing us to provide the level of service needed by today's library patrons.

Sincerely,

A handwritten signature in cursive script, appearing to read "Phyllis Jose", with a long horizontal flourish extending to the right.

Phyllis Jose



## ROYAL OAK PUBLIC LIBRARY

222 E. ELEVEN MILE ROAD  
P.O. BOX 494  
ROYAL OAK, MICHIGAN 48068-0494

CAROL WINDORF  
DIRECTOR

(248) 541-1470

April 24, 2000

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, Michigan 48909

Dear LSTA Team:

I am writing to support the OWLS / DALNET / Macomb Grant project to provide library clients in southeastern Michigan with a regional catalog.

As a participant in the OWLS Region of Cooperation virtual catalog project in 1999-2000, Royal Oak Public Library and our patrons found the catalog very helpful in locating materials that we do not own. We are also very interested in an expanded virtual catalog for the southeastern Michigan region.

Royal Oak is an urban city located very near to Macomb County and Detroit. Our patrons are accustomed to using our shared (TLN) catalog to find what's owned in nearby libraries within our cooperative, then driving to a different library to pick up the materials that same day. A catalog that includes libraries in neighboring urban regions within Macomb County and metropolitan Detroit would be the next step in services to our residents.

We are excited to learn that OWLS is applying for an LSTA grant that builds and expands on it's proven Z39.50 model. It will bring the rich resources of various libraries in two more major areas to our residents. We heartily support this project and request that you seriously consider awarding LSTA funds to the OWLS Region of Cooperation.

Sincerely



**PUBLIC LIBRARY**  
40255 Dodge Park Road  
Sterling Heights, MI 48313-4140  
TEL 810.446.BOOK(2665) • FAX 810.276.4067  
WWW SITE www.shpl.net

**CITY COUNCIL**  
Mayor Richard J. Note  
Mayor Pro Tem Deanna E. Koski  
Councilman Roger A. Fachini  
Councilwoman Kathryn George  
Councilman Jay Pollard  
Councilman Steve Rice  
Councilman Joseph V. Romano  
**CITY MANAGER**  
Steve M. Duchanc

April 19, 2000

Tammy Turgeon  
Library Cooperative of Macomb  
16480 Hall Road  
Clinton Township, MI 48038-1132

Dear Ms. Turgeon:

I enthusiastically support the TLN/ DALNET/ LCM grant to create a share catalog with interloan capabilities.

Libraries serve as learning centers in their communities. This grant would enable local libraries to expand their collections and resources beyond the physical and financial limitations of their buildings and budgets.

As a member the Library Cooperative of Macomb, the Sterling Heights Library now loans an average of 22,000 items each year and borrows an average of 21,000 items. With the Z39.50 Internet technology, residents would greatly benefit from the seamless interface to a wide range of library holdings throughout the region. We would indeed become *The Information Place!*

Our Cooperative has an excellent history of effective implementation of new technologies and resource sharing, with the goal to improve library service to community residents. This grant would provide an excellent opportunity for us to continue to develop technological improvements in collaboration with OWLS and DALNET to improve our educational infrastructure.

Sincerely,

A handwritten signature in cursive script that reads 'Carol Lingeman'.

Carol Lingeman  
Library Director





University Libraries

April 20, 2000

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, Michigan 48909

Team Members:

We wholeheartedly support the efforts of OWLS, DALNET, and Macomb County, to provide clients in southeastern Michigan with the benefits of a unified library resource sharing system. The anticipated system will give clients web-based access to a much wider range of collections than would otherwise be possible.

This timely project is consistent with the University of Detroit Mercy Libraries' goal of broadening the scope and extent of materials available to clients in the most cost effective manner. Its multi-type, multi-jurisdiction character provides a good model for a regional information hub that can be adopted throughout the state.

We encourage Team members to approve funding for this proposal, and thereby encourage adoption of shared technical standards, policies and procedures, rather than the more localized resource sharing methods that might otherwise be developed, given the technical feasibility of such systems.

Sincerely,

A handwritten signature in cursive script, appearing to read "Margaret E. Auer".

Margaret E. Auer  
Dean of Libraries

A handwritten signature in cursive script, appearing to read "Leo A. Papa".

Leo A. Papa  
Associate Dean for Technical Services and Systems

C/O: Eileen Palmer, Library Network  
13331 Reeck Road, Southgate, Michigan 48195  
Fax: 734-281-1905



3038 LIVERNOIS ROAD  
P. O. BOX 7006  
TROY, MI 48007-7006

April 25, 2000

PHONE (248) 689-9202  
FAX (248) 619-9066

The Library of Michigan  
LSTA Team  
P.O. Box 717  
W. Allegan Street  
Lansing, Michigan 48909

Dear Sirs,

#### Letter of Support for LSTA grant: General Technology

In broad terms, the project to virtually connect the collections of both public and academic libraries, across six southeastern counties is a natural evolution in library services. If we acknowledge the main purpose of any library is to provide access, then this project will provide exactly that, and provide it far more easily than has hitherto been possible. We have several other models to compare with the current one under consideration, Ohiolink and Pharos being just two. They have both worked well for their designers and fulfilled expectations. Walsh College supports this project because it will provide for our patrons capabilities we have not had in the past, such as:

- Search a variety of electronic resources using a single web interface.
- Select multiple resources, enter a single search statement, and search all of those resources at the same time.
- Check the collections at another library and then easily and quickly request items not available locally.
- Users may request copies (electronic or print) of items and may request delivery of materials from other libraries.
- Patron-initiated inter-library loans where a patron, from any of the connected libraries, can themselves initiate the process, thus bypassing much of the existing paper-based machinery.
- Having this and Access Michigan® databases on the same platform, forming an integrated gateway to any number of sources.

#### Z39.50

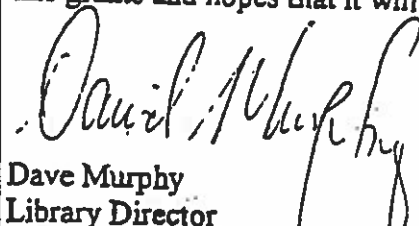
The project will use Z39.50 standard communication protocols because of its flexibility and ease of implementation. All libraries in the three consortia have Z39.50 capability and one, OWLS has developed its own working model to implement across the six counties. In short we are not looking at expensive, untried technology, but implementing a protocol that would be easy for libraries to connect to.

**Expertise**

Each of the three consortia has their own cadre of expertise. The system librarians in DALNET and based at Wayne State University have just completed a project bringing up libraries at thirteen institutions, on nearly 30 sites and all using the same library system. This project, therefore, would not require the hiring of expensive consultants. It is a doable project now.

There are many reasons why this project ought to be funded and some have been outlined in this letter, but as a librarian myself, albeit in an administrative role, I have always felt one element that causes great disparity across society and ethnic groups is the lack of access to information. Knowledge is power; it is the road to prosperity for many. Access to organized information brings with it economic freedom. Certainly without it we have ignorance. This too could be the basis of a state-wide information network that many other states have boasted of. Managed and grown properly, what the LSTA team funds today, could reach every library in Michigan.

Walsh College, as a member library of DALNET and of the library community supports this grants and hopes that it will be funded.

  
Dave Murphy  
Library Director  
Walsh College Libraries



**Wayne State University**  
Office of the Dean  
University Libraries  
Library & Information Science Program  
Media Services  
University Press  
Office for Teaching & Learning  
Detroit, Michigan 48202-3962

April 20, 2000

The Library of Michigan  
LSTA Team  
P.O. Box 30007  
717 W. Allegan Street  
Lansing, MI 48909

Dear LSTA Team:

As Interim Dean of Wayne State University Libraries, I wish to show both personal and institutional support for the proposal to provide links among the OWLS/DALNET/Macomb consortia. The main purpose of the grant is to provide funding for networked interlibrary loan (ILL) capabilities, but such links often lead to future enhanced cooperation in both technological and service areas.

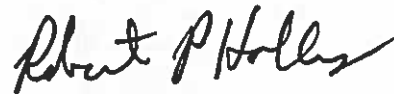
I see this project as particularly important for the following reasons:

- The project will provide increased ILL capabilities to large numbers of patrons of multitype libraries in the most populous part of Michigan.
- The project will help unify the information resources of this important region for economic development, educational excellence, and personal growth.
- By linking a major urban library, the Detroit Public Library, with suburban libraries, this initiative will be a step towards overcoming the "digital divide."
- The project will lead to cost savings for ILL transactions since the software will manage administration and messaging among the libraries.
- The use of Z39.50 technology will allow patrons to use their home systems without having to learn different command structures.
- The project can serve as a prototype for similar projects with the eventual goal of connecting the entire state.

In sum, this project meets one of the principal reasons for providing grant funding--the end result will be increased service at a reduced cost.

I can be reached at 313-577-4021 (voice), 313-577-5525 (fax), or aa3805@wayne.edu (email) if you should need additional information.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Robert P. Holley". The signature is written in a cursive style with a large initial "R".

Robert P. Holley  
Interim Dean  
University Libraries

# DALNET'S VISION FOR THE NEXT GENERATION INFORMATION SERVICES AND SYSTEM

The closing years of the 1990's will be a time of transition as Detroit Area Library Network (DALNET) prepares for and begins migration to the next generation information system--one that will deliver the information services needed by our member libraries and their users in the 21st Century. DALNET librarians expect that there will be a noticeable and significant shift from print to digital resources and from in-house to remote access use for all our member libraries. They see the online catalog as just one of many resources, as users expect access to the information itself, not just the bibliographic citations. The new system will be more than an integrated library system; it will likely integrate multiple systems to deliver these expanded information services.

## DALNET's Vision

By the Year 2000, the Detroit Area Library Network (DALNET) will:

1. Be widely recognized as a model cooperative information service provider, one that anticipates and supports the information needs of a diverse community of users in the Metropolitan Detroit area;
2. Through creative partnering, provide excellent, flexible, responsive and cost effective services to the DALNET libraries and the communities they serve;
3. Become a regional information provider of the unique resources of the members and their communities; and
4. Become an established gateway to information resources worldwide.

## DALNET's Users

DALNET's primary users are the citizens of the tri-county Detroit Metropolitan area, which now number over 3.9 million. Of DALNET's 500,000 registered borrowers, over 106,000 are children under the age of 18. These students learn about the DALNET Online System at their local branch libraries. About 135,000 library cards have been issued to adult residents of the area who use the Detroit Public Library (DPL) system. DPL also issues about 20,000 library cards to citizens of Michigan outside of Detroit, in its role as a state-wide resource library.

As these students graduate from high schools and go on to the area's colleges, they are very likely to attend a college or university that is part of DALNET. Recent enrollment figures show there are over 90,000 students in DALNET institutions. Most students live and work in metropolitan Detroit and many attend school part-time. Some take classes at

more than one institution at the same time, and many transfer from community colleges to four-year institutions to obtain undergraduate, graduate, or professional degrees.

DALNET's hospital libraries have affiliations with the Wayne State University School of Medicine, as well as with the nursing, dental, and allied health programs at other DALNET academic institutions. Students, residents, and medical faculty move among the academic institutions and the hospitals for their instructional, research, and clinical work.

As students graduate and become professionals, some work in DALNET hospitals, the Oakland County Court system, and the Detroit Institute of Arts where they use the DALNET Online System in those special libraries. Many are employed by the area's largest employers, including General Motors, Ford, Chrysler, Detroit Edison, Ameritech, NBD Bancorp, and various accounting and law firms. Most graduates find employment in the metro area and continue to use the DALNET Online System by dialing in from their offices, corporate libraries, and homes.

The DALNET patron database reveals that over 120,000 users have library cards from more than one DALNET institution. This represents a considerable overlap among users, who benefit from learning a common interface to information that they can use at any DALNET library throughout their lives.

### **DALNET Users' Information Needs**

DALNET's diverse users value highly information services and systems that save them time and effort. They need:

1. *ONE-STOP SHOPPING* for information, with the integration of a comprehensive online catalog of all DALNET libraries' resources, citation and index/abstract databases mounted locally or remotely, catalogs of other libraries in the area and State, full-text/image databases (including journals, encyclopedias, dictionaries, and other reference books), and local administrative information systems in a single workstation;
2. *DESKTOP DELIVERY* of information, not only in DALNET libraries, but also on their campus or institution networks and to their homes and offices;
3. *CUSTOMIZABLE and SPECIALIZED USER INTERFACES* for DALNET's diverse user groups, with features such as a simplified interface for children, a basic interface for adults, and research-level interfaces for specialized disciplines such as medicine and law that can be selected by the user; a "kiosk" option for unattended public access stations; and menus or icons that display the databases accessible to different groups of users both in the various DALNET libraries and from remote dial up workstations;
4. *INTERNET ACCESS* using a Web interface with hypertext links to locate not just bibliographic and indexing records but also the *CONTENT*--whether full-text, image, sound, or video, and regardless of its location in the world;
5. *WORKSTATION INTEGRATION* of information--both citations and content--importing into users' information management software for learning, instructional, research, publishing, clinical practice and recreational uses;

6. *UNIQUE LOCAL INFORMATION* accessible via the DALNET Online System-- information that is either not yet available on computer or is on a standalone system, for example, DPL's Information and Referral Service and the Burton Historical and Automotive History collections;
7. *CONTINUOUS AVAILABILITY* of the DALNET Online System 24 hours a day and 7 days a week;
8. *ONLINE END-USER ACCESS* to DALNET libraries' services, including online requests for materials in DALNET and other libraries, user-initiated holds, user-accessible circulation records, and an online user-alerting service;
9. *EASY ACCESS* to and *PROMPT DELIVERY* of traditional information resources stored in DALNET libraries to all users, including on-site access to those collections open to the public, expedited inter-library lending for those collections that cannot be open, and remote access to collections elsewhere in the State;
10. *HELP* facilities for those users who need technical support to use the DALNET Online System, even to their desktops;
11. *TRAINING* capabilities to teach staff and users how to use the system and how to locate and use electronic information.

### **DALNET Information System Components**

To achieve our vision and provide these 21st Century information services to users, DALNET offers a bold new vision of the future information system. This system will build on the foundation already in place. This list of components does *not* include all the standard features of current integrated library systems, such as authority control with global change capabilities and circulation charge, discharge and hold features, but instead focuses on innovative new features.

#### **1. ONLINE CATALOG (Bibliographic access)**

Provide users with a union catalog display as well as individual library catalog displays by collection, building, library, and groups of libraries;

Provide a choice of interfaces to meet the diverse needs of DALNET's users, which range from children to college students, from faculty and professionals to the general public;

Provide "user friendly" interfaces that have well-developed, context-sensitive online help that will guide users through the information retrieval processes;

Include bibliographic records for electronic library resources included in the DALNET Gateway (see 6) with hyperlinks from those records to the full-text, images, sound, or videos.



## 2. SHARED INTEGRATED LIBRARY SYSTEM

Enable DALNET libraries to use a single, shared bibliographic record for a title held by more than one member library, with the ability to store unique information about local copies;

Enable the output of individual DALNET libraries' bibliographic, holdings, and authority records, as needed, in standard MARC formats;

Enable library staff to manage their own holdings yet be able to participate in centralized processing, including both ordering and cataloging services, within DALNET;

Enable electronic data transfer, including MARC bibliographic, authority, and holdings records, vendor invoices, and citation records with abstracts, between the local system and a variety of information providers/vendors;

Enable electronic fund transfers to pay vendor invoices from multiple DALNET institutions;

Provide the capability to order, receive, pay for, inventory, and circulate titles with very large numbers of copies and locations, e.g., 600 to 800 copies distributed among 30 buildings;

Enable DALNET libraries to create and manage records (for non-bibliographic data) for unique collections or information resources, such as the Information and Referral Service at DPL;

Provide a serials control module that predicts receipt of pieces, automates the update of bound volume holdings, includes bindery management, and interfaces with OCLC's local data record system;

Use shared files and records to minimize duplication of work among DALNET libraries, for example, prediction pattern records for serials, authority and patron records;

Enable DALNET libraries to further improve operational efficiency by automating areas not currently supported by the DALNET Online System, including electronic course reserves and media booking services;

Provide a security system for staff in DALNET libraries to be authorized to do their work as individuals or as members of groups;

Provide statistical and management data from all appropriate files with an online querying capability for staff to both display data online or export it in a standard format to create customized reports for individual DALNET libraries as well as groups of DALNET libraries.

## 3. COLLECTION MANAGEMENT

Enable individual library as well as DALNET-wide collection management to minimize duplication among libraries, including collection usage and overlap reports at the title level, e.g., for serial titles;

Enable a DALNET library to be designated the archival repository for a title on behalf of all DALNET libraries and not withdraw the last copy held without review;

Provide collection analysis capabilities within and among DALNET libraries, for example, by classification number ranges;

Enable a DALNET-wide Digital Resources Team to evaluate and select resources to add to the DALNET Online System.

#### 4. CENTRALIZED PROCESSING

Enable DALNET libraries to participate in, as desired, centralized processing services, including purchasing, receipt, cataloging, and database management for traditional as well as electronic resources;

Provide a staff security and record management system that allows one person to do centralized processing for several DALNET Libraries;

Include a statistics capability to track services provided, e.g., number of titles cataloged and withdrawn;

Provide a way to create customized reports or electronic interfaces with local institutions' accounting departments.

#### 5. RESOURCE SHARING

Enable DALNET library patrons to move freely among member libraries that participate in reciprocal borrowing, for example, with a single library card issued by the home library;

Enable DALNET patrons to make online requests for information or for materials, whether in DALNET's collections or in the collections of other libraries or information providers listed in the user interface;

Enable DALNET staff to mediate online requests for materials, as desired, with both automatic and "manual" routing of requests to national-level Inter-Library Loan systems, including both OCLC and DOCLINE;

Enable transmission to users desktops of articles whether found in print or electronic format;

Provide self check-out, user-initiated holds, user accessible circulation records, and a user-alerting service;

Provide statistical and management data in a standard export format to create customized reports on DALNET's users, including reports on overlap of users among member libraries.

#### 6. GATEWAY TO ELECTRONIC RESOURCES

Enable the creation and maintenance of a DALNET Gateway as a "front-end" to more than 1,000 full-text, bibliographic, numeric, and other digital resources accessible via the Internet;

Provide the latest Z39.50 and Web connectivity to electronic resources that follows open system industry standards;

Enable the Gateway to be developed and managed by a team of experts in various disciplines from all DALNET libraries;

Enable centralized automated updating of Internet addresses for these resources;

Provide secure, controlled access to these resources as required by the terms of agreements with the information providers, including authentication, metering, accounting and electronic billing services;

Include these resources in the specialized OPAC interfaces as appropriate to the user.

#### 7. DIGITAL RESOURCES (Access and Creation)

Enable DALNET libraries to digitize unique materials, e.g., slide collections, archival materials, sound and video collections, and rare books, and make them accessible not only to their library users but also to citizens of the State of Michigan and beyond;

Integrate into the user interface access to index/abstract and full-text or image databases purchased collectively from other vendors with options for access via Z39.50 or via specialized vendor search software, as desired;

Integrate into the user interface Z39.50 links to other online catalogs, and enable the listing of these OPACS to vary by DALNET library;

Enable interfaces that can be customized for the type of user and by library, depending on the resources to which they subscribe;

Provide security features that enable subsets of DALNET libraries to subscribe to electronic resources and provide access to their users desktops;

Find ways to provide electronic access to local campus, institution, and community information resources to users of DALNET's Online System.

#### 8. INFRASTRUCTURE

Maximize the investment made in the current shared system hardware, software, and networks;

Ensure system reliability and performance for automated library operations 24 hours a day and 7 days a week with at least the current percentage of up-time, backup, recovery, and response time in a network that connects over 70 buildings in a 30 mile radius of one another and serves over one-half million patrons;

Enable centralized technical support services for DALNET system management, server administration, distributed printing, system backups, and trouble-shooting;

Provide systems that will run on microcomputer workstations with standard operating system software, with access to printers, high quality color monitors, and headphones for sound, as needed;

Provide systems that will work with workstations that also have the latest word processors, spreadsheets, database managers, statistical packages, bibliography makers, presentation and desktop publishing software for users' information management.

Integrate fully with the emerging technical services workstations that include cataloging tools, efficient record editing features, and online record transfer to and from OCLC and other vendor sources;

Operate with TCP/IP connectivity.

#### 9. MIGRATION STRATEGIES

Provide flexibility for DALNET libraries to migrate to the new system within a specified time period and to choose those capabilities of the system they need;

Support a phased approach to migrate from the private IBM-based SNA network to the TCP/IP network required for full use of the new system;

Support efficient file conversions for the large shared files as well as the individual databases from DALNET's current system to the new system;

Assist with installation of the needed telecommunications systems;

Minimize disruption to the production online system for the actual migration for each DALNET library.

#### 10. USER EDUCATION PROGRAM

Provide ways for DALNET to deliver a user education program that promotes the effective use of DALNET libraries' rich resources with an array of user-friendly interfaces;

Provide online tutorials and context-sensitive help for staff mode;

Enable a visible means to make DALNET a well-known information provider in the Metropolitan Detroit area;

Provide a way for users to give feedback and suggestions to DALNET libraries about their online services.

# VISION AND IMPLEMENTATION STRATEGIES

## Vision

The Detroit Area Library Network (DALNET) and Ameritech Library Services propose to create, through their partnership and shared effort, a model urban information hub in the Detroit area. The hub will be a single source of information and library-based services providing access to the shared resources of the partners and DALNET member institutions. It will serve as a gateway to information resources worldwide that supports the life-long learning needs of the people of the Detroit metropolitan area. It will improve access to unique local information, special collections, and services available through DALNET member institutions. Finally, it will enable DALNET libraries to play a leadership role within their institutions and communities in the delivery of information to meet the library-based learning, research, professional, cultural, and recreational needs of their users.

In order to actualize this shared vision of an information hub, featuring DALNET services and Ameritech systems, DALNET and Ameritech commit to the following:

- Development of a computerized system to serve as the foundation for the information hub of a large multi-type library consortium that includes academic, public and special libraries, and that can be expanded to include school libraries.
- Design of an easy-to-use interface to DALNET's information hub that has a consistent "look-and-feel" yet can be customized for specific user groups as they access DALNET libraries' information resources and systems throughout their lives.
- Development of a network infrastructure, including critical help desk services, that ensures system availability and responsiveness to DALNET's staff and users in DALNET libraries, as well as in their offices, classrooms, and homes.
- Migration from the "legacy" NOTIS system to the new system in a manner that minimizes disruption to DALNET's users, takes advantage of the power of desktop computers, and maximizes operational efficiencies for DALNET libraries' staff.
- Improved access to, and sharing of, DALNET libraries' traditional collections, electronic materials, special collections, and local digitized information resources through the hub.
- Provision of a cost-effective system for a large consortium through shared expertise, cooperative services, and shared information systems and resources.
- Enhanced visibility of DALNET, particularly its member libraries' resources and services, as a means to identify new partnerships and funding sources that will help build the information hub.

## Implementation Strategies

The implementation strategies to achieve these goals are as follows:

### Information Hub Strategies

- Implement the Horizon system, enhanced in the areas mutually agreed on, as the foundation for DALNET's information hub.
- Include DALNET's participation in writing specifications, evaluating, and testing prototypes for the Horizon system enhancements.
- Integrate the Horizon system with DALNET libraries' desktop computers and network-based information resources, systems, and services.

### Interface Design Strategies

- Design a children's catalog interface to include such features as automatic spell checking, ranked retrieval sets, concept searching and librarian-designed canned searches.
- Design Web-based (thin) client software to shared systems for DALNET libraries' users that improve patron access and ease of use while reducing client software maintenance costs.
- Integrate DALNET libraries' institutional Web home pages and Web-accessible systems with the NOTIS LMS and Horizon systems implementation.

### Network Infrastructure Strategies

- Design a private TCP/IP network for participating DALNET libraries to ensure acceptable network performance and reliability.
- Provide help to DALNET libraries for needs assessment, selection, and installation of desktop workstations for both staff and users.
- Develop a shared Help Desk service to provide trouble-shooting within the private TCP/IP network for participating DALNET libraries.

### System Migration Strategies

- Install bridge products in the current mainframe-based NOTIS environment that will also be fully functional in the Horizon environment, to serve both the NOTIS and new systems during the transition and to relieve demands for ongoing NOTIS support.
- Implement WebPAC to provide user access to LUIS with standard Web browser software, which will give a new look to LUIS during the transition, take advantage of desktop computers in DALNET libraries, and provide a platform for developing the children's catalog interface.
- Implement InfoShare, a UNIX-based database server system, to replace MDAS as DALNET's citation database system.
- Shift resources from centralized mainframe systems support towards the new client/server systems, TCP/IP networks, and PC and network support services by:
  - Migrating to the latest IBM operating system OS/390.

- Freezing NOTIS enhancements beyond Release 6.4.
- Contracting for NOTIS day-to-day technical support after Release 6.4 is installed until late 1999.

### **Resource Sharing Strategies**

- Implement RSAS, the interlibrary loan and document delivery management system, after WebPAC is operational, to provide users with the ability to request both traditional and full-text documents and to provide a platform for testing in a multiple-library environment with both OCLC and DOCLINE ILL systems.
- Identify local information resources that already are or could be digitized and undertake projects to make them available through DALNET's information hub.
- Continue to seek opportunities for DALNET libraries to share the costs of electronic library information resources available from both commercial and non-commercial providers and make them accessible through the DALNET information hub.
- Identify special collections and other materials in DALNET institutions that should be made accessible and undertake projects to add them to the information hub.

### **Cost Sharing Strategies**

- Develop an equitable cost-sharing plan among the DALNET member libraries for the new system, with baseline components supported by all members and optional components to be selected by individual members.
- Identify funding sources or donated services to help carry out these initiatives.
- Develop new or improved cooperative services, such as the Help Desk service for desktop computers and the DALNET network, DALNET database maintenance, and shared cataloging.
- Negotiate group-purchasing discounts for software, desktop workstations, electronic resources, and other supplies or equipment.

### **Promotion Strategies**

- Issue joint press releases with Ameritech to publicize milestones reached during the partnership.
- Target the spring 1999 ACRL conference in Detroit as an opportunity to showcase the DALNET information hub.

**THE LIBRARY COOPERATIVE**  
16480 Hall Road  
Clinton Township, Michigan 48038

**Annual Plan**  
**1999-2000**

I. Mission:

The Library Cooperative (TLC) is an independent organization of libraries in southeast Michigan that have joined to secure those services which can be performed more effectively and economically as a group. The Cooperative does not provide direct service to the public; rather, it assists member libraries to expand and improve library service to their constituents.

II. Philosophy:

The Library Cooperative is member driven. The Council of library directors makes recommendations to the Cooperative Board, which has legal responsibility for the organization.

In order to enhance local library services, TLC members whose local government support a signatory library, will provide reciprocity among the member libraries.

III. Services

A. Core Services

1. On-line services

- a. Three terminals, one barcode scanner and one printer provided free to each member library; two terminals, one barcode scanner, and one printer provided free for each additional library branch.
- b. Additional free terminals are available based on a formula.
- c. Additional terminals are available on a fee basis to access existing modules.
- d. Additional peripheral equipment such as printers, lasers, etc., are available on a fee basis.
- e. Provide firewall protection to automation systems.
- f. Upgrade Dynix software as new releases become available.
- g. The Cooperative provides orientation and training on the automation system.
- h. Technical support for Dynix and non-Dynix computer problems.
- i. Online and dial-up access to databases.
- j. Access to the Internet within member libraries. Dial-up access to the Internet for library staff, government employees, and elected officials.
- k. Provide backup equipment as needed.

2. Acquisition, cataloging, and processing.

- a. Contract with Macomb County Library for bibliographic database maintenance and authority file compliance.
- b. Reimburse processing fees for member libraries up to \$1.00 per item.
- c. Provide order lists and book display.
- d. Pay for bibliographic utility services (OCLC and Bibliofile).



3. Centralized purchasing.
    - a. Allocations for member libraries.
    - b. Negotiated discounts with vendors including free shipping for library materials, equipment, services, supplies and electronic resources.
  4. Printing.
    - a. Equipment, supplies, personnel.
    - b. Distribution of graphic work samples including forms originating from member libraries.
  5. Training
    - a. Training opportunities for staff, trustees and government employees.
    - b. Annual inservice days to be held the Thursday and Friday after Labor Day.
    - c. Upon the recommendation of the Council, additions will be made to the Professional Development Collection.
  6. Fiscal agent for:
    - a. Macomb Literacy Partners.
    - b. Macomb Region of Cooperation.
    - c. Member library AV accounts.
  7. Public relations.
    - a. Committee will recommend programs, exhibits and public relations pieces.
  8. Interlibrary Loan
    - a. Pay OCLC charges.
    - b. Contract with the Macomb County Library for delivery of materials.
  9. Other.
    - a. Associate memberships.
    - b. Consultant aid for cooperative-wide projects.
    - c. Consultant aid for equipment purchases.
    - d. Legislative involvement on library issues.
    - e. Consider standardization of services and fees where possible.
    - f. Grant application for cooperative-wide projects.
    - g. Administration of grants received.
- B. Current Year Goals:
1. Automation -
    - a. Upgrade telecommunications lines as needed.
    - b. Develop an automated system funding policy.
    - c. Evaluate Ameritech Library Services and other vendors.
    - d. Investigate the need for additional staff.
    - e. Create a committee to evaluate and recommend electronic databases.
    - f. Develop and implement a systematic approach to capturing statistics on electronic usage of library resources.
  2. Explore menu services and review core services.
  3. Negotiate formal delivery contract with Macomb County Library.
  4. Explore a formal delivery connection between TLN, MCC & TLC.
  5. Explore electronic access to other shared systems (TLN, DALNET, etc.)
  6. Explore full reciprocity, cooperative wide on all types of materials.

7. Investigate outsourcing of printing.

**IV. Reconsideration of the annual plan:**

The plan shall be reviewed annually in June by the Planning Committee. The representative of each group shall rotate alphabetically within three groupings as stated below. That committee shall recommend to retain the current plan as stated or shall propose revisions. Recommendations of the committee shall be considered by the members within each grouping, then by the Council as a whole and based upon the Council's recommendation, by the Cooperative Board.

**Groups:**

- I. Armada Free Public Library, Center Line Public Library, Lenox Township Library, MacDonald Public Library, Lois Wagner Memorial Library, Utica Public Library.
- II. Chesterfield Township Library, Eastpointe Memorial Library, Fraser Public Library, Harper Woods Public Library, Macomb County Library, Mount Clemens Public Library, Romeo District Library, Shelby Township Library.
- III. Clinton-Macomb Public Library, Roseville Public Library, St. Clair Shores Library, Sterling Heights Public Library, Troy Public Library, Warren Public Library.

*Approved by LCM Council 9/16/99*

*Approved by LCM Board 9/30/99*

1. **What is the mission of your library or consortium? Please note that the goals and strategies you list to answer the next question should be tied to this mission.**

The Library Cooperative of Macomb is an organization comprised of public libraries in the Macomb area which have joined to secure those services which can be performed more effectively and/or economically as a group. The Cooperative does not provide service to the public; rather, it assists member libraries to expand and improve library service to their respective constituents.

2. **What are your goals and strategies in using technology to meet this mission? Please state these goals clearly and use the strategies to provide measurable milestones to meet your mission. This plan should cover a period of three years. Fiscal or calendar years are acceptable. If your institution is required by local authorities to operate under a longer planning cycle, this is acceptable.**

**Goal 1:** Provide email / Internet access to all Library Cooperative of Macomb member library staff, trustees, and local government officials

**Objective:** Install upgraded email system by August 1999

**Activities:** Order new hardware  
Install additional phone lines

**Target Benchmark:** This goal will be considered successfully met if 24 new phone lines, a new email server, and the terminal server are installed by August 1999.

**Goal 2:** Provide effective telecommunications lines between libraries and the central site.

**Objective:** Investigate the use of cable as a connection between libraries.

**Activities:** Contact local cable companies.  
Receive quote for services, if available.

**Objective:** Upgrade telecommunications lines as needed.

**Activities:** Upgrade telecommunications lines for libraries that have at least 20 PCs at their location by December 1999.  
Upgrade telecommunications lines for libraries that have at least 15 PCs at their location by July 2000.

**Target Benchmark:** This goal will be considered successfully met if all 27 lines are reviewed for usage and those libraries with at least 15 PCs have their telecommunications lines upgraded to 256K or T1 speed by July 2000.

**Goal 3:** Provide inexpensive access to online databases of interest to the member libraries.

**Objective:** Investigate various online reference products available

**Activities:** Register for trials of databases.

Sign purchase orders as a group for consortium discounts.

**Objective:** Coordinate purchases of online databases with those available from the Access Michigan project and subscriptions through MLC.

**Activities:** Develop a schedule for regular renewals / new databases to be introduced to libraries based on the Access Michigan schedule of October - September

**Target Benchmark:** This goal will be considered successfully met if we add 3 new databases over the next 3 years and renew all of the databases that are currently subscribed to by our members.

**Goal 4 :** Provide reliable Internet access

**Objective:** Investigate new ISP – both traditional and cable vendors

**Activities:** Contact vendors for available services and pricing

**Objective:** Review contracts yearly for current ISP

**Activities:** Investigate customer service of ISP  
Measure down time of ISP

**Target Benchmark:** This goal will be considered successfully met if we experience no more than 2% downtime in our Internet service. This information will be reviewed annually when a contract is finished to determine if we will continue service with the same ISP.

**Goal 5:** Provide a state of the art automated circulation system for all member libraries.

**Objective:** Maintain current system with emphasis on training and more efficient use of the system.

**Objective:** Investigate the purchase of a new system

**Activities:** Research current vendors  
Send out an RFP for a new system  
Decide on a new system by September 2000  
Install new system in early 2001

**Target Benchmark:** This goal will be considered successfully met if we install a new circulation system by March 2001, and our system circulation numbers increase by 10% over the next 3 years.

**Goal 6: Promote member libraries on the Internet.**

**Objective:** Provide space on web server

**Activities:** Upgrade current web server to provide more space for each library during FY1999/2000.

**Objective:** Conduct workshops

**Activities:** Keep trainer on staff to conduct web development workshops.

Maintain and improve Internet Training Center to support workshops.

**Target Benchmark:** This goal will be considered successfully met if we conduct 25% more web workshops for our members from 1999 levels and have 90% of our libraries maintain their own web pages.

**Goal 7: Provide technology training for member libraries.**

**Objective:** Systems Librarian will conduct monthly workshops on various automation system modules.

**Activities:** Develop a 6-month workshop booklet to promote workshops offered by the Cooperative.

Retool previously held workshops for maximum educational benefit.

**Target Benchmark:** This goal will be considered successfully met if we conduct 5 workshops per month over the next three years.

3. Please describe the technology already in place to meet your mission. What additional hardware and software will be needed? Include your plans for replacement of outdated equipment.

#### Inventory of equipment

- IBM RS6000 Mainframe – this machine is used for our shared automated circulation system. We have committed to replacing this system every 5 years using our fund balance.
- Email Server – Modem Rack: used to provide email/Internet service for all member libraries' staff and trustees and local government employees.
- 2 Web Servers: provide space on one web server for member libraries' web pages. Provide space on another web server for outside domain names for member libraries and local government.
- CD-ROM Server: provide access to various CD-ROM products to all member libraries.
- Personal Computers – we have a total of 500 PCs at all of our 20 member libraries' locations that are connected to our WAN. All of the PCs are 586 machines, which were purchased on or after September 1995.

Armada	9
Center Line	9
Chesterfield	12
Clinton Macomb	7
Eastpointe	22
Fraser	14
Harper Woods	10
Lenox	6
Macomb County	36
Mount Clemens	15
MacDonald (New Baltimore)	10
Lois Wagner (Richmond)	9
Romeo / Washington	25
Roseville	32
Shelby	20
St. Clair Shores	30
Sterling Heights	49
Troy	62
Utica	6
Warren	65
Library Cooperative of Macomb	52

- Modems – used at member libraries for ordering materials from vendors
- Terminal Servers – used to provide local email / Internet / library catalog access to staff, government officials, and the public from outside the library.
- Routers, Hubs, CSU/DSU – used to connect libraries to our shared automation system and the Internet.

- **Telecirc Server** – used to make calls to patrons for items that are overdue or items that they have on hold.
- **Network Printers** – 1 is provided for each library to reduce printing costs. Maintenance fees are paid to ensure replacement of the equipment when it no longer functions.

#### **Software**

- **Dynix** - circulation software
- **QVTnet** – telnet software
- **Netscape Navigator** – web browser
- **Microsoft Office** – word processing, spreadsheet, presentation, database software
- **Front Page** – web page development software
- **WSFtp** – ftp software
- **Various vendor software packages for ordering materials electronically**

The LCM Board approved an equipment replacement schedule in May 1999. Other equipment is replaced when necessary using a separate maintenance fund. There is a separate line item in the budget for replacement of equipment.

4. Please describe briefly the training and/or technical skills your staff already possess. How do you plan to train your staff to help meet its mission? Specifically, what training or continuing education will staff receive in using technology to achieve the mission?

**List of staff involved directly with technology:**

Gayle LaPlante      Computer Service Supervisor  
Responsible for the daily operations of the automated system.  
Kristen Valyi-Hax      Systems Librarian  
Responsible for training and troubleshooting of the automated system.  
Chris Frezza      Technician II  
Responsible for maintaining the web, email, and Internet services.  
Ken Valyi-Hax      Technician II  
Responsible for maintaining computer hardware at all member library locations.  
Vicki Harris      Technician I  
Responsible for running reports on automated system and troubleshooting.  
David McGraw      Technician I  
Responsible for weekend and after hours system maintenance.

**Technical skills of staff:**

Unix	Windows 95/98/NT	Dynix
Web page development	Online database searching	Hardware installation
Software installation	Internet searching	Network protocols (TCP/IP)
Microsoft Office products		

The Library Cooperative of Macomb provides money and time to attend conferences, workshops, and independent study to review the latest changes in technology.

Employees attend COMDEX, Internet World, local workshops, MLA, ALA, and CODI (Customers of Dynix Inc).

The Library Cooperative of Macomb also subscribes to various technology publications including PC Magazine, Windows Magazine, etc. to keep staff informed.



**5. Please describe your proposed technology budget for the three years of this plan.**

	<b>YEAR ONE</b>	<b>YEAR TWO</b>	<b>YEAR THREE</b>
Hardware	240,000	330,000	240,000
Software	25,000	225,000	25,000
Telecommunications	180,000	200,000	200,000
Database Licensing	57,500	57,500	57,500
Contract Services	160,000	80,000	80,000
Staff Training	9,500	10,500	11,500
Depreciation	280,000	380,000	280,000
Other: Internet	<u>36,500</u>	<u>54,750</u>	<u>54,750</u>
<b>TOTAL</b>	<b>\$788,500</b>	<b>\$1,337,750</b>	<b>\$748,750</b>

**6. How will you evaluate progress in achieving the goals and strategies you've outlined in question 2? How will you decide to make course corrections, if indicated?**

The Library Cooperative of Macomb's Annual Plan is reviewed every June. It includes plans for technology and other services that the Library Cooperative of Macomb provides to its member libraries. It also provides member libraries with the opportunity to express what needs they have as well.

Regular meetings of the Internet & Networking Committee are held to review LCM's progress in the areas of technology.

Quarterly budget review by the Library Cooperative of Macomb Board.

If corrections are necessary, change budget, committee make recommendation to Council, then to Board.

**7. How will the savings from the USF discounts be applied in your library or consortium?**

The savings will be used to upgrade telecommunications lines and equipment between libraries and the central site, upgrade telecommunications hardware, and help to prioritize the replacement of PC hardware every four years.

**The Library Network  
Technology Plan Revision  
June 1999**

The mission of The Library Network is to improve, enhance, and extend library service to its member libraries.

The Library Network is the largest library cooperative in the state of Michigan, serving residents located throughout Wayne, Washtenaw, Oakland, Livingston and St. Clair counties. The cooperative strives to provide and facilitate quality library services to its member libraries thereby improving library services to their communities.

The TLN staff is committed to the provision of quality services that meet member library needs. TLN recognizes that different libraries have different needs and attempts to design services and products that meet this wide range of needs.

This plan was prepared based upon priorities outlined in TLN's current strategic plan (Values and Visions).

### **Goals and strategies**

#### **A. To facilitate resource sharing among all TLN members.**

Support for resource sharing activities is a cornerstone of TLN's service program and is supported through our state aid funded delivery system. Technology objectives related to resource sharing are:

1. To provide members with access to electronic interlibrary loan. TLN uses OCLC's Interlibrary Loan system to electronically submit and track member initiated interlibrary loan requests. In 1998 TLN processed more than 22,000 ILL requests on behalf of its members. (ongoing activity).

2. To facilitate the use of Z39.50 technology to interconnect TLN member library catalogs for the purpose of enabling ILL and, where appropriate, direct borrowing. In 1999 TLN will implement (in conjunction with OWLS) a Z39.50 server to interconnect several TLN member libraries with each other and with other regional libraries. TLN projects growth in the number of libraries participating in this project to be at 25% per year.

3. To maintain and operate a telecommunications network linking TLN members with each other and with the Internet. TLN operates a frame relay based telecommunications network linking 61 buildings. In 1999 TLN will implement improvements to the network combining the use of cache

servers, higher speed lines and ATM technology. We expect to reduce response time and improve performance with these upgrades. In 1999 we will:

Complete 15 telecommunications circuit upgrades;

Slow growth of the wide area network's bandwidth requirements by 15%;

Install 25 cache servers at member libraries on the TLN WAN by November 1999. Decrease bandwidth utilization at each site by 25%.

**B. To assist libraries in the management of their collections and operations through the administration of a shared library automation system.**

1. Support a system that provides a full complement of library collection management and patron management tools including a public catalog (currently both telnet and web based), catalog creation and maintenance, circulation, acquisitions, serials control, and other information management functions. (ongoing)

2. Work with the Shared Automation Council in the evaluation of improvements and enhancements to the current system as well as plans for the future. Our current agreement among users of the system is set to expire in September of 2000. By January of 2000 TLN shared system participants will have recommendations regarding improvements in the structure of this service. In the year 2000 we will focus on developing a step by step migration path to a new client server based library system.

3. Implement the use of the Acquisitions module. This will facilitate the electronic ordering of materials, allow libraries to electronically track funds, and provide library staff and patrons with up to date on-order information.

4. Beta test and implement the new web catalog. This is the first step on the evolutionary path to our next generation client/server library automation software.

**C. To provide quality continuing education and training in multiple formats through the identification of new areas of need, and the marketing of TLN developed programs to new audiences.**

1. Deliver continuing education and training programs using a variety of formats and delivery systems. TLN, in collaboration with statewide

partners, developed the Community Information Toolkit which provides a multi-format approach to its subject matter. TLN will deploy the Toolkit in 1999, assess its effectiveness and develop a plan for further multi-format based programs in 2000. TLN will also assess and develop training packages to be used in self directed learning environments.

2. Develop training and continuing education programs based on identified member needs. TLN offers a regular calendar of technology training classes. The schedule changes each year based on member needs. Current classes include Introduction to Win95, Win95 Transition, Using Microsoft Word, Using Microsoft Excel, Using Microsoft Access, Local Area Networks, Introduction to the Web, Finding Information on the Net, Downloading Plug-Ins, Using FirstSearch, Using InfoTrac, The Interactive Internet, Netscape Composer, Working with Images and Computer Troubleshooting. TLN develops its training calendar on a six month rotation with new classes offered when member needs are identified. In 1999 The TLN Technology Committee began advising TLN staff on course development. This collaboration led to the development of the 2 day Computer Troubleshooting class offered in the Summer of 1999. Such collaborations are expected to continue and result in a program much more closely aligned to member needs. Classes expected to be added to the curriculum in late 1999 and into 2000 include additional classes in support of AccessMichigan databases and classes on workstation security.

3. Develop training and continuing education programs in support of TLN's shared library system (DRA). TLN staff offer ongoing classes in the use of the DRA library system. Classes include: Inventory (item linking), Quick Catalog, Circulation, Information Gateway, Serials, and Troubleshooting.

**D. To assist member libraries in acquiring, supporting and maintaining the technology necessary to achieve their service-related goals. TLN provides a variety of services to member libraries to assist them in the day to day management of technology in the library. Specific ongoing activities include:**

1. Membership in the state of Michigan's Extended Purchasing Plan, providing discounts on technology and telecommunications related products.
2. Negotiation of discounts with vendors whose products are of interest to libraries.
3. Purchasing support.

4. Installation of TLN supplied computer and networking hardware and software.

5. Troubleshooting and consulting assistance.

E. To collaborate with members on the identification, assessment, application, and/or implementation of emerging technologies. One of the ways in which a cooperative like TLN can assist its members is in the identification and evaluation of new technologies and/or applications. By taking the lead for its members cooperatives can help individual libraries spread out the risk associated with new technologies. TLN membership, in its 1998 strategic planning process, asked TLN to develop a more formal program in this area. That program is expected to be designed in late 1999. At present it is expected to include a technology assessment phase, a technology/application testing component, evaluation criteria and reporting mechanisms.

## **Technology Assessment**

### **Central Site**

#### **Telecommunications Circuits**

TLN operates a wide area network to 61 library buildings throughout the cooperative. 60 of those sites are public library buildings. Most sites are connected to a frame relay switch via a 56K connection and the frame relay switches are connected to TLN via 4 T1 lines. Two sites are connected to TLN via direct T1 attachments. TLN also maintains two separate connections to the Internet, both at T1 speeds.

Over the last year about one third of our wide area network participants have upgraded from their original 56K connections to speeds of 256K or T1. In 1999 an additional 15 libraries are likely to upgrade. Our existing contract for telecommunications circuits expires in September of 2000 and in late 1999 TLN will begin an examination and assessment of telecommunications options including ISDN, DSL, cable, frame relay and ATM technologies.

#### **DRA System**

The TLN shared library automation system is housed on two DEC Alpha 2100/275 servers, in a clustered environment running Open VMS v7.1. Each Alpha server has 576 MB of memory and they share a total of 25 GB of hard disk storage space. Each Alpha server has a double-speed CD ROM drive and a 2.88 MB 3.5" floppy drive. Network connection is provided using Multinet

v4.1b, DECNet and a 100 MB ethernet card in each Alpha server. System backups are serviced by a TZ-87 20 GB tape drive. Power management is provided by a Powerware Prestige UPS system and is monitored by Powermon II power management software.

The TLN shared library automation system software is DRA (Data Research Associates) Classic v2.5-1.

### **Internet Server**

TLN has several linux and unix based servers which provide email, DNS, web services (including storage of member library home pages) and Z39.50 services. The most heavily utilized servers were purchased (one was leased) in 1999 and are expected to meet TLN's server needs in this area through 2002.

### **Administrative Servers**

TLN has three administrative servers to support accounting and general office management services. The oldest server (the WOLF server) is used to support the current accounting system. A new server was purchased in 1998 in anticipation of the implementation of a new accounting system. The WOLF server is expected to be offline by the end of the year 2000.

Staff have access to all servers but are being migrated to the administration server for basic file storage and sharing functions.

### **Staff Workstations**

TLN has, over the last several years, been upgrading staff workstations to Pentium level machines. We still, however, have a number of lower level machines in use. Each department is responsible for budgeting the funds to upgrade their equipment and it is expected that all upgrades will be completed by the end of 2000. Some TLN departments have begun to lease equipment as a more efficient way of ensuring upgrades occur in a more timely fashion in the future. TLN will assess the effectiveness of this approach and may migrate all staff workstations to leased workstations in 2001 and 2002.

### **Networking**

TLN supports a number of networking protocols including IPX (Novell), TCP/IP and Windows NT. The TLN Building is wired with standard category five cable. (see attachment for diagram of internal network). By

2001 TLN will have eliminated its IPX dependent system and migrated to Windows NT for internal applications.

### Member Libraries

TLN member libraries have a variety of technology available to them. Those participating in our shared library system have, at a minimum a Cisco 2500 series Router, Motorola or Kentrox CSU/DSU's, LRS16 Lantronix network hubs, and various computer platforms ranging from I486 to Pentium Xs. The computer Operating Systems range from Windows for Workgroups to Windows NT 4.0. The libraries are wired with standard Category five cables, tested to 100 MB. These computers are connected to TLN through the use of the network protocol TCP/IP across TLN's WAN.

### Training

Technology training has been addressed elsewhere in this document, as it is a fundamental and integral part of what we do. All TLN staff are able to take advantage of the types of training previously outlined. TLN's staff have a past practice of building their technology skills through a combination of in-house training and external training opportunities. The current contract with TLN professional staff requires that each staff member be allotted \$500 per year for use in support of continuing education and professional development.

<b>Budget</b>	<b>1999/2000</b>	<b>2000/2001</b>	<b>2001/2002</b>
Hardware	\$ 39,588	\$ 85,000	\$ 125,000
Software	\$ 153,000	\$ 156,000	\$ 160,000
Telecommunications	\$ 297,913	\$ 315,000	\$ 367,000
<b>Database Licensing</b>			
Contract Services	\$ 78,855	\$ 83,225	\$ 85,550
Staff Training	\$ 25,000	\$ 25,000	\$ 25,000

### Evaluation

TLN believes that in the current climate of change and technology advancement it is challenging to develop a technology plan that provides the guidance necessary to chart its course without being so confining as to make mid-course corrections impossible. In keeping with the approach adopted in

the TLN Strategic Plan, the TLN Technology Plan evaluation component will be its most important and most evolutionary component. While the plan includes some broad targets, specific objectives will be assessed and identified annually.

The TLN Technology Plan will be reviewed annually by the TLN Steering Committee and the Shared Automation Council. Progress reports on achieving objectives will be made to the TLN Board after each annual review. Each annual review will include an evaluation of the previous year's accomplishments as well as the specific objectives to be achieved in the coming year. The TLN Board will be asked to incorporate the new objectives as an addendum to the original plan.

**Year One Activities are:**

**Complete implementation of the OWLS Z39.50 server. Expand the number of TLN members participating in this project by 25%.**

**Complete 15 telecommunications circuit upgrades.**

**Slow growth of the wide area network's bandwidth requirements by 15%.**

**Install 25 cache servers at member libraries on the TLN WAN by November 1999. Decrease bandwidth utilization at each site by 25%.**

**Improve DRA system response time by adding additional memory and replacing the current hard disks with faster disks by October 1999. This upgrade will also allow for the implementation of member holding section files. Holding section files will allow web based access to individual member library holdings.**

**Develop a migration plan for implementation of the DRA TAOS product by March 2000.**

**Complete implementation of the Acquisitions software module including the fund tracking and electronic ordering functions. Have 25% of libraries using this module by September 2000.**

**Implement the DRA Web2 product (complete with individual member holdings files) by December 1999.**

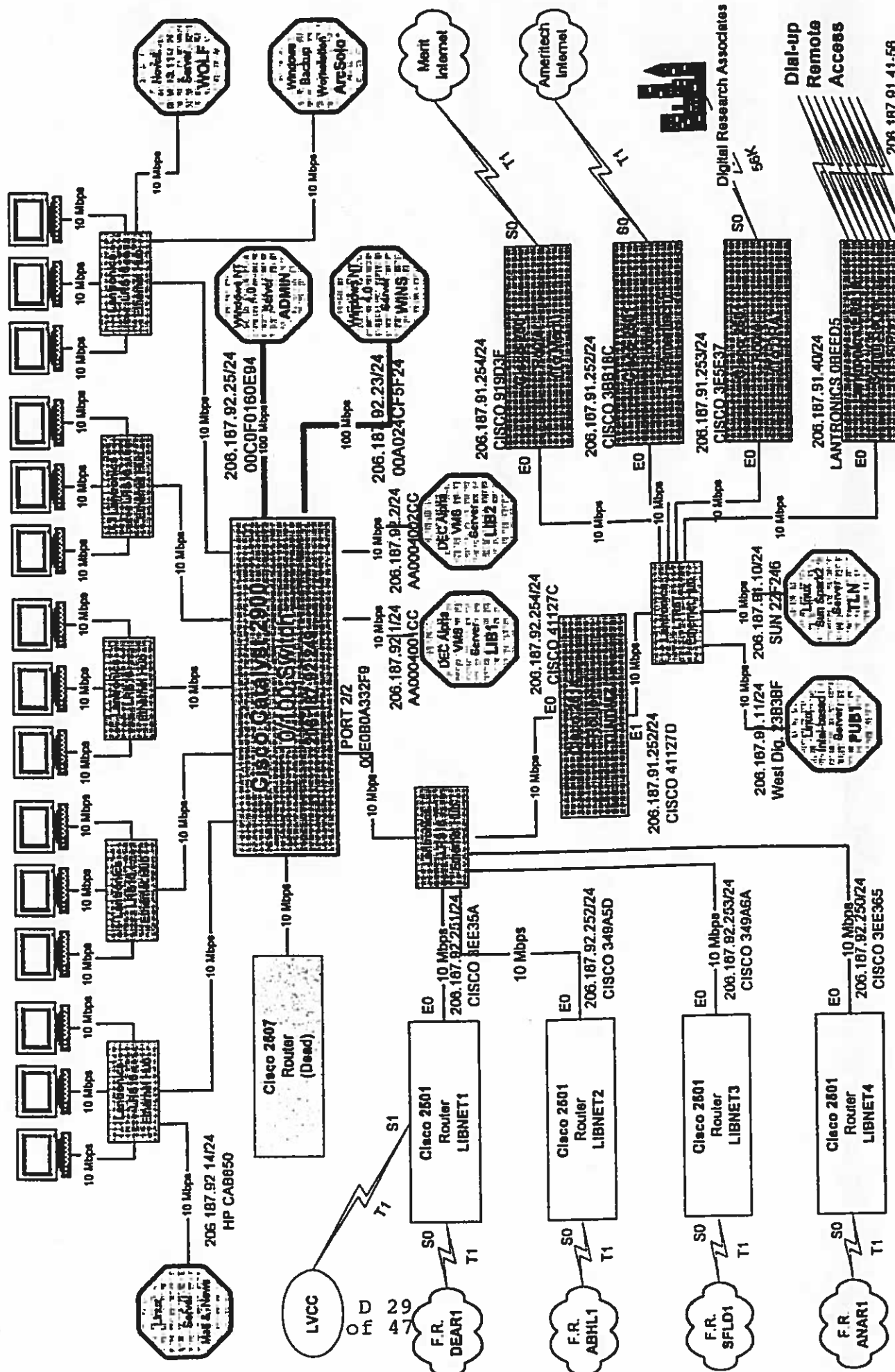
**Develop a plan for working with member libraries to identify and assess the application of emerging technologies to library service by July 2000.**



### **Impact of USF savings on TLN**

**TLN passes all USF discounts directly to its member libraries. Decisions about how to use savings are local decisions.**

# The Library Network Central Telecommunications Facilities



**OWLS**  
**STRATEGIC FOLLOW-UP PLANNING RETREAT**

**SUMMARY**

**TLN HEADQUARTERS  
SOUTHGATE, MICHIGAN**

**1 OCTOBER 1999**

**Joseph J. Mika  
Facilitator**

**OWLS BOARD FOLLOW-UP STRATEGIC PLANNING RETREAT**  
**1 October 1999**  
**TLN Headquarters**

**Introductions**

Phyllis Jose, Chair of OWLS, began the session by welcoming the participants and having each person introduce themselves.

**Members Present**

Kevin Brandon, Concordia College.  
Pat Coady, Henry Ford Centennial Library  
A. Michael Deller, The Library Network  
Phyllis Jose, Oakland County Library  
Leslie Kee, Baldwin Public Library  
Bob Kelly, University of Michigan Dearborn  
Eileen Palmer, The Library Network  
Carol Windorf, Royal Oak Public Library  
Sandra Yee, Eastern Michigan University  
Joseph Mika, Facilitator

**Purpose**

Joe began by going over the planned agenda and time schedule. He then referred to pages 7-10 of the summary of the last meeting. These included the following highlights.

- PARTICIPANTS AGREED - THERE IS A FUTURE FOR OWLS - BUT NOT AS SEPARATE ENTITY
- ANY NEW ORGANIZATION NEEDS TO BE MULTITYPE
- WE NEED TO CREATE REASONS TO JOIN THIS ORGANIZATION
- WE NEED TO FIND A NICHE FOR THE ORGANIZATION
- WE NEED TO STOP DUPLICATION / CREATE WAYS TO COORDINATE
- INTERLIBRARY COOPERATION IS ONE POSSIBLE GOAL
- INTEGRATE OWLS INTO SOME EXISTING ENVIRONMENT. QUESTION IS WHICH ONE
- CREATE WAY FOR NON-PUBLICS TO VOTE IN THE NEW ORGANIZATION

See attached pages 7-10 from summary for 4 June 1999 meeting.

Comment was made that the intent is to integrate into something but we don't know what.

Eileen then discussed the "Summary Budget for the LSTA Project" and how funds are spent within OWLS. (See attached pages - Library of Michigan FY 1999 LSTA Subgrant ROC Application, pages 9, 6, 7, 8)

How do we spend the money now?

Originally received almost \$38,000 in an annual grant that did not require competition. Just fill out a form and we got the money. This year we are on the first of the planned cutback that will do away with the funding and have only 75%, \$28,100, of the money. Of that money we will spend \$12,000 on TLN staff support, postage, phone copying, newsletter, facilitators on reorganization, etc. About \$8,000 is spent on training - for the last 3-4 years the ROC has purchased classes for ROC members at no charge. Last year it was \$14,500 and now down to \$8,100 - an indication of the reduced funding. Resource sharing is the third way in which we spend funds. ILL requests come to TLN and then go to OCLC. TLN is reimbursed 5\$ for ILL. Money has dropped as have ILL requests.

Ongoing costs for OWLS include: Virtual union catalog project will be funded at least through one more year; Software support, server fee, and OCLC to maintain the webZ software. July 2000-June 2001 budget will be for \$18,700, the year after that will be \$9,000, and then it's \$ 0. Some of the ROCs will not go beyond this year. We get the most money so we can probably exist longer. The \$9,000 could support the union catalog. We would have to reallocate funding if we want to change what we are doing.

Joe asked if the ROC can make money? Eileen responded that the ROC can't charge for something that LSTA money funds. Possibly can charge if we fund the development of a curriculum. We need to be creative in getting the best use of our dollars.

Can you carry money forward? No. OWLS does not have any legal standing so can not carry money forward.

### Current Organization – Discussion

TLN plan of service group was a motive for getting plans of service from every coop in the state. There was interest in the Southwest coop because southwest is the first multi-type coop (or so they say). In terms of voting, it appears that the schools and the academic libraries have ex-officio non-voting members on the board. They convene and reconvene under different groups so that they can vote.

Phyllis feels key is membership and it may be time to try to lobby for a multitype organization. She doesn't think it will come this time but it will come down the road. Michael isn't as optimistic. Big piece is state aid. The need is to establish

a formula so that members could pay the same as public libraries that use state aid to pay. Some have tried to brainstorm ways to redo existing plan to make it financially equal. But can they vote? Legally – no.

Kevin: perception of group on state aid is perception of TLN. If TLN goes multi-type, it will lose money, but in reality it would bring in more participants. Because the money is a grant to the public libraries for the services there is no way that new libraries can tap into those resources. The group would be enriched by new members, but that never got across as a message.

Michael: doesn't think that there will be new monies going to the coop if non-public libraries join. Some public librarians feel that they were sold down the river with change to LSTA. Deller's take is that it wasn't his (public libraries) money from the beginning. Public libraries feel possessive about state aid and LSCA. They feel their services would be diluted if more libraries get the same funding that only go to public libraries now (pre-LSTA). It'll be a tough sell – to work toward multitype organizations.

Pat: feels there is a change in class VI libraries. They were worried about the changes at the time. Message that came through at the last meeting was that we have to stop whining and start looking ahead at how to create a bigger piece of everything so that we can all get more. Need to forget about LSCA to LSTA and the OCLC hold on Michigan. Just a part of the fabric. Let's go on and think about something that can help us and survive the type of tax shifts that are happening. Class VI will fund a study to look at other groups to study and prepare a tool for us on other models. Pat's take on plan of service meetings is that people are listening, but they are struggling with how to not violate the law and deal with the membership governance issue, and how to deal with new members. How do we make a desirable and responsible change? We need to enrich the coop and its ability to function. It is a question of mechanics and how far can you go within the law. One, is to stay in compliance and, two, we do not overly restrict our thinking. Just be careful of the boundaries. It's hard to interpret the law.

Eileen: feedback into the process is an opportunity. Pat: it's a stroke luck to have an examination and it is a legitimate piece for discussion. People are open now and want to get away from negativity. How do we creatively make ourselves stronger, richer, better?

Kevin: we're positioning ourselves to reengineer statewide library services. Not just Michigan – all libraries in the U.S.

Is the Virtual catalog – a threat or an opportunity?

## How to Reorganize

Joe then led the group in a discussion of "How To Reorganize?"

First, Joe described the organization of the Southwest ROC where multitypes all sit at meetings of the cooperative and have a vote only on matters that affect the multitype members and do not involve cooperative or state or federal funds received for public libraries. Public libraries pay their membership from their state funding; others (multitypes) pay \$100 dues.

It was pointed out that TLN already has a similar membership category - called Associate Members at \$150 fee. Associate members have access to membership services. They can share in acquisition benefits; in shared automation benefits; services are provided at "a cost out" process. This membership category is in the bylaws. This was a normal growth process that TLN experienced. Associate members do not get a vote, but there is a place on the board for a non-public liaison to have a non-voting seat on the board. It is in the TLN bylaws.

One of the benefits of membership is the opportunity to participate in the statewide bid list for book vendors. Others include group discounts with Borders, Staples, and Demco. In essence participation in these programs get the member their membership fee back in discounts.

Pat : we need to have dialogues with associate members even if they can't vote so that we can get in their field of vision and find a way to make their interests a win-win solution for all. It was mentioned that one contract needed is for "binding."

Discussion moved to how would a steering committee be organized. We have a steering committee and we are locked into the model we are currently using. But, there could be more than one steering committee. For example: public libraries and associate members; or, one for public, one for school, and one for academic libraries if they have enough mass.

OR, There could be one steering committee with break-out groups by size and by type. Will have to educate the board as to who the service groups are; how it is constituted; how they behave as a group. When it is a multitype, there are things that are really important to one group that are no big deal to another.

Phyllis: likes one committee with breakout sessions for the types of members. We need to get away from the lines that differentiate us.

At the plan of service meetings it is clear that public libraries don't want to subsidize other libraries. But, we need to look at how we can do it with everyone being equally financially responsible for their share of the burden. State aid takes care of public libraries, but others will have to ante up.

Pat: we need to look at multitype models throughout the country. We need something simple and understandable.

Kevin: do we need to partner with MLA?

Eileen – without a statewide mandate, how do we really get going? Library of Michigan took what little organization structure it had and decided to do away with it under LSTA. We need to figure out how to leverage all types of libraries within the system. How do we move forward?<sup>4</sup> Other state models have legislative mandate and a funding piece, but can we do something at our level to move that along, or at the very least to do what we can to make sure that our OWLS people are getting the best library service that they can get?

Pat – regardless of legislation – the models might give us ideas and we might take pieces of it. Bring in a networking guru to work with us on this.

Michael: what is being looked at – is a plan of service process. Not a long process. It's our opportunity to create a model. The rules are not as stringent as they sound. Let's bring in people. We can incorporate into a plan of service and it can be done fairly quickly and we can test it before the ROCs go out of operation. This would accomplish a couple of things. Instead of public libraries talking about what they fear, they would find out how the other person is reacting and see what the others are willing to contribute to the process. If people are working together it is healthier and, this is the plan of service reorganization process. If the Southwest cooperative thinks that having the exofficio members at the table when the board is meeting works, then Michael also sees that as a workable model for TLN. What TLN has is a very large group of people using one significant service who feel that they should also have a voting member at the table.

Pat thinks there are those who would prefer a sub-committee of the board.

Eileen: we can feed in to the process that is occurring now at TLN and try to make TLN a suitable organizational structure? Way to do it is to ask OWLS board to meet jointly with them for one meeting.

We won't get to a resolution on this issue in the absence to a statewide approach. Are there things that we can do to influence and shape what the statewide picture looks like? We could do things that we 're not doing – speak with one voice discussion – we could advocate within OWLS and set up an



advocacy network. It will lay the groundwork for whatever resolution we want to come.

OWLS provides the opportunity for SWOV - the Speak With One Voice suggested at the Preferred Futures conference

Kevin: surprised MLA isn't concerned with the dissolution of ROCS.

Michael: MLA forms its legislative agenda and right now November is a key moment because the committee will come to the annual conference with an agenda for the next 12 months. People can ask questions and impact the agenda at the annual meeting. The important time is to talk to the public policy committee now. There have not been enough people concerned about this, so it isn't an issue.

Sandy: not a whole lot of ROC activity throughout the state. The others are dealing with their coops and academics are dealing with their group, etc. OWLS is probably the best one.

Eileen: ROCs created not really for multitype organizations but as a funnel for Title III LSCA dollars. Never intended to do anything but distribute the funds. Now, the funding is being taken back.

Phyllis: lots of people might not even miss us – it was federal dollars, not local dollars that funded ROCs.

Joe: could it be because people saw it as a TLN service, not a ROC service.

Eileen: even with ILL going down, people don't have a sense of the organization.

Phyllis: This is an opportunity to BE BOLD. That is what will get the legislature's attention. We have linked the multitype libraries together already. We need to do this statewide. We have to be bold, look at where we want to be and how we can get there.

Bob: delivery component is so important.

Michael: Delivery exists as a backbone. Just need to tie this together. We need a brochure to give to the legislature.

Kevin: Can we video OWLS catalog project?

Joe: suggested legislative day – need to demonstrate there. We could organize and take it to them.

## DISCUSSION SUMMARY HIGHLIGHTS:

Members would serve on the committees: Possibly in alphabetic order

- Larger groups could be organized for reactions
- What is each member willing to contribute?
- All can be at the same table
- Others can be integrated into the groups as the organization progresses
- Feed into the process that exists and demonstrate awareness for others  
TLN is therefore a suitable structure

OR, OWLS board could meet jointly with TLN board

We should use and capitalize on the ROC catalog project.

We should look at what we want to be – then how do we get there?

Create a brochure to hand out to the legislature on the OWLS catalog project

Freeze OWLS board as is – put links in place during the next funding periods

- Between OWLS and TLN steering committee
- What to do over the next few years?
- To demonstrate what works

Possible to bridge with another cooperative –

- ◆ Macomb
- ◆ Mideastern

It was suggested that it would be good to look at other state multitype models in existence.

It was noted that there is an absence of a statewide mandate for multitype cooperation / organization in our state.

Other states have had state “legislation” calling for multitype coordination, organization, and have had funding to support this reorganization

It was suggested that maybe a consultant on networks would be beneficial. Someone who would be available for 1-2 days.

## How To Fund

The next area for discussion centered on “How to Fund” the new organization.

Discussion centered on what should be funded with existing dollars in the ROC and for the immediate future.

Eileen: Freeze OWLS BOARD, put the linkages in place with OWLS and TLN steering committee and act as if this is the right way to go. Use the funding and determine priorities for the next couple of years to position for having a model that will work to improve delivery of library services.

Bob: make it significant enough as to make it important.

Sandy: tie in with other coops? Macomb, Mideastern (Flint)? ). Or, let's take the money and plug it in to getting done what we need to get done to reorganize TLN as a multitype organization.

- Plug it into the process of new organization
- More funding into the catalog project
- Training - this is what our members find of interest
  - Training needs to be centered on Access Michigan – First Search; IAC
  - Has been found to be beneficial by members; needs to be continued
- Education - that this ROC does not cost members / libraries money
- Education - that a ROC organization is not expensive
- Delivery of ILL
- Maximize the delivery piece - important
  - Possible grant
  - Important to all
  - Physical delivery is the problem
  - New dollars can be found for this project

ORCA - suggested as name for the catalog

- OWLS Regional Catalog Association
- tie in to Michigan Virtual University – a role here is possible
- tie in to Cyberstate.org

Suggested to "Re-Look" the exiting \$\$ – what to do with the existing \$28,000

- Contract with someone to create a new organization / give direction
- Grant for delivery of materials
- Collect data on successes / failures of multitype groups
  - what works?
  - this was agreed to be left to "later" in the process

Talk to Sara Bearman regarding writing grants

Build in to the funding the need to continue this organizational process.

## FINAL DECISIONS / PLANS FOR FUTURE

1. Continue As Is
2. Current OWLS Board Stays In Place
  - Meet with TLN Board
3. During Next 18 Months Concentrate ON:
  - A. ORCA - contact Macomb, Mideastern cooperatives to meet at MLA and show them the catalog and invite cooperation
  - B. Training
  - C. Meetings for Reorganization - create framework
  - D. Public Relations
4. Collect Multitype Information
5. Grants
  - Explore funding possibilities
  - Pursue multiple grants
  - Delivery - move toward statewide catalog
  - Contact Sarah Bearman

## OTHER ACTIONS

- Eileen and Michael - start to come up with ways to spend the money for OWLS
- Send information on What is transpiring; Keep informed; Invite to next meeting:
  - Patrick Coady
  - Carol Windorf
  - Sandy Yee
- Need to document what this ROC is going through for the field
- What has happened as a document for others to consider / use

## GROUP WORK

Joe then divided the members into two groups. During the group sessions, Joe asked the groups to Focus on the Future; to create an Ideal Future for OWLS. The groups were advised to consider the following questions as they worked and to do it as brainstorming – don't critique.

- Should OWLS cease existence?
- Should OWLS merge with a cooperative - which?
- What are the benefits of merging?
- Should OWLS become a 501(c)(3)?
- Should OWLS become a governmental agency?
- Is there another vehicle for operation?
- What services are now offered?
- What services should be offered?
- What services should be continued?

The Purpose of the group session is to: Imagine an OWLS future you want to work toward.

- Imagine yourself 5 years in the future. It is June 2004.
- Visualize the OWLS you want as if it exists.
- What is OWLS life like?

- Give special attention to:
- Membership mix
  - Specific services
  - Specific programs
  - OWLS operations and structure
  - Partner relationships
  - Breakthrough advances
  - Financial status
  - Public recognition
  - What is no longer done/offered
  - Desirable features

## GROUP REPORTS

### GROUP 1

1. Yes, There is a future for OWLS
2. Multitype Cooperation needs to continue

#### Recommendations:

- a. Talk to cooperatives and legislature to change the law – include multitype
- b. Decentralize the structure
- c. Create reasons for others to come to the table
- d. Find a niche that OWLS fits
- e. Create a way for non-public libraries to have a vote on cooperative boards

3. Should OWLS continue to exist as a separate entity?

NO

4. Is there a role for, need for services that, OWLS provides?

YES

- Library organizations need to define the roles
- Stop duplication and coordinate
- Consider the impact of distance learning
- Interlibrary cooperation
- Key piece is that “home” library maintains support level

5. Cooperation can not be used to undermine local support regardless of library  
public / academic / school / special

6. Need to integrate OWLS into existing organization(s), but need to establish basic standards

#### ISSUES:

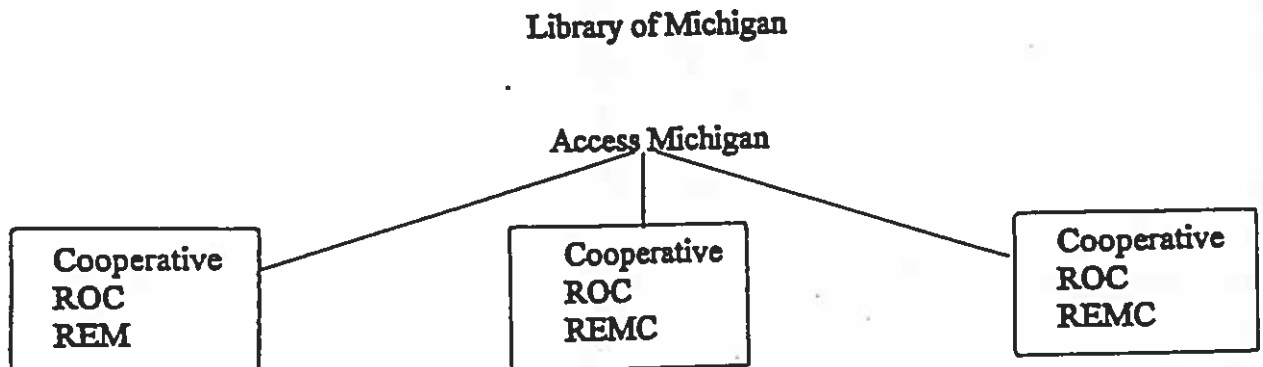
- a. Structure – multitype
- b. Funding – cooperative and public libraries (split)
- c. Standards / local library
- d. Establish reasons / value for cooperative roles
- e. Build on coordinating existing groups, e.g., medical, schools
- f. Don't reinvent

**POSSIBLE PROGRAMS / SERVICES:**

- ILL**
- Document Delivery**
- Electronic Connectivity**
- Training**
- Networking**
- Professional Development**

**GROUP 2**

1. **Is there a future?**  
Questionable and depends on audience, services, and projects.
2. **Who is the audience?**  
Varies by project / grant  
Access Michigan training
3. **What is the need?**  
ROCs are not needed for document delivery
4. **Do projects like Access Michigan and Cooperatives replace all the services of ROCs?**  
Possibly
5. **A possible structure / role is depicted below.**



Following the sharing of group discussions, Eileen mentioned that TLN might be revising its plan of service within the next year and possibly would consider creating the opportunity for multi-type structures. The participants agreed that a valuable beginning was made during the retreat; that the participation of academic libraries was very useful; that it was too bad that a school library was not present; and that another session needed to be held that would continue this dialogue. This session could be held after the "Creating A Preferred Future For Michigan Libraries" session to be held September 17 and 18, 1999, and probably after the TLN annual meeting.

Joe brought the retreat to a close by pointing out that the follow-up meeting could be organized to create the strategic plan, and what needs to be developed is a "mission statement," "goals," and "strategies." He thanked all the participants for their time and efforts toward generating progress in creating a new vision for OWLS.

The follow-up meeting was set for October 1<sup>st</sup>, 1999, at 10:00 am at the Baldwin Public Library.



*Library of Michigan FY 1999 LSTA Subgrant ROC Application*

Applicant Library Name: OWLS Region of Cooperation

**Summary Budget for the LSTA Project**

<b>Budget Categories:</b>	<b>Amount:</b>
A. Communications	
B. Library Materials and Supplies	
C. Professional Services and Costs	<u>\$11,745.53</u>
D. Promotion and Outreach	<u>\$ 3,220.47</u>
E. Technology	<u>\$ 5,050.00</u>
F. Training	<u>\$ 8,100.00</u>
G. Miscellaneous	
<b>Total</b>	<u><b>\$ 28,116.00</b></u>

**Library of Michigan FY 1999 LSTA Subgrant ROC Application**

Applicant Library Name: OWLS Region of Cooperation

**Project Objective:**

Reproduce as necessary

**Objective #\_1\_:**

To provide for the general operations and administrative functions of the OWLS Region of Cooperation including systematic, documented administrative procedures and fiscal management, communication with members, grant writing and administration, the planning and facilitating of resource sharing, ongoing strategy and long range planning, provision of materials, and document delivery.

**Project Activities:**

1. LSTA grants will be applied for and administered, if awarded. OWLS will seek to assist members in forming collaborative partnering relationships in developing grant proposals.
2. Board meeting minutes will be distributed, keeping the membership informed of Board and statewide Region of Cooperation activities and concerns.
3. Long range plans, developed in FY 1998/1999 will be implemented and communicated to the membership.
4. A quarterly newsletter will be published detailing OWLS activities, statewide opportunities, and providing for exchange of ideas, the sharing of information and concerns, planning, and promoting project activities.
5. TLN staff will provide membership services and recruitment support, participation in all meetings of the Board and coordination of all ROC activities.
6. Funds will be used to cover a percentage of the single audit costs that relate to grant funding, as incurred by OWLS' fiscal agent, The Library Network.

**Budget for this Objective**

Budget Category	Explanation	Amount Requested
Budget Category	Explanation	Amount Requested
Professional Services	Deputy Dir. (15hr/mth@\$31.6230 - 12 months)	\$ 5,692.14
	Admin. Asst. (15hr/mth@\$19.4633 - 12 months)	\$ 3,503.39
Promotion & Outreach	Postage (Minutes, newsletters, etc)	\$ 1,420.47
	Photocopies (Minutes, surveys, etc @.05)	\$ 1,800.00
		<b>\$12,416</b>

**Library of Michigan FY 1999 LSTA Subgrant ROC Application**

Applicant Library Name: OWLS Region of Cooperation

**Project Objective:**

Reproduce as necessary

**Objective #\_2\_:**

To provide technology training to OWLS member libraries.

**Project Activities:**

1. Training sessions will be held in The Library Network's Training Center's and other locations within the region.
2. The OWLS Board will work with TLN to select training classes based on the needs expressed by members (through surveys).
3. The Library Network will provide the trainers for all the sessions.

**Budget for this Objective:**

Budget Category	Explanation	Amount Requested
Budget Category	Explanation	Amount Requested
Training	18 TLN Training Classes @\$450/class	\$ 8,100
<b>Total</b>		<b>\$ 8,100</b>

**Library of Michigan FY 1999 LSTA Subgrant ROC Application**

Applicant Library Name: OWLS Region of Cooperation

**Project Objective:**

Reproduce as necessary

**Objective #\_3\_:**

To support resource sharing through the provision of interlibrary loan to OWLS members and the support of the virtual online regional catalog developed through an LSTA project.

**Project Activities:**

The OWLS Board will contract with The Library Network for the provision of a coordinated interlibrary loan service that will provide OCLC access to materials to libraries that do not have it. OWLS member libraries will be able to submit requests for items to the Interlibrary Loan Department of The Library Network. TLN staff will:

1. Search and obtain materials through The Library Network's shared system database;
2. Search holdings of other OWLS libraries through OCLC or other local databases;
3. Search otherwise unfilled requests and request from outside the Region through OCLC and/or ALA Interlibrary Loan Request Forms sent via fax or mail;
4. Will act as a referral agent on OCLC for Region libraries with OCLC GAC capability, giving them OCLC access beyond the statewide database.

The OWLS Board will also contract with The Library Network for maintenance of the software and server used for the OWLS regional virtual catalog and will pay for this year's annual software maintenance fee.

**Budget for this Objective:**

Budget Category	Explanation	Amount Requested
Budget Category	Explanation	Amount Requested
Professional Services	510 ILL's @ \$5.00	\$ 2,550
Technology	Annual Server Support Fee (paid to TLN)	\$1,000
	Annual Software Support Fee (paid to OWLS)	\$4,050
<b>Total</b>		<b>\$ 7,600</b>