

Building a virtual library

How the University of South Florida Libraries did it

by Monica Metz-Wiseman, Tina Neville, Ardis Hanson, Kim Grohs,
Susan Silver, Edward Sanchez, Margaret M. Doherty

If academic libraries had feet, what pathways would they tread in quest of the virtual library? Will the new millennium be a prosperous "golden age" for those daring enough to embark on the journey now, or do the electronic equivalents of whirlpools and monsters await? No less than the heroes of the epic sagas, all types of libraries now face these "how" and "when" dilemmas. The University of South Florida (USF) Libraries explored these questions, made their choice, and are implementing the organizational and technical changes necessary to build a virtual library.

USF is the second largest institution in the State University System with 34,000 students and 2,000 faculty members. Within the USF library system there are five libraries geographically separated by 60 miles. Focusing on remote users with more than 87% of the students living off-campus, the libraries also support an average annual enrollment of 10,000 students in distance education programs.

In the planning and implementation of this project, library staff confronted a number of firsts: cross-functional teams with facilitators as managers; project- and user-

driven goals; system-wide positions; and new budgeting techniques driven by cost/benefit analyses.

The planning process

In September 1995 the USF Library directors charged the Virtual Library Planning Committee with the development of a virtual library plan. Goals for the virtual library included: access to expanded services and resources for all eligible users regardless of geographic location; the development of an easy-to-use, yet powerful retrieval system; support for distance learners; a heightened awareness of existing on-site collections and services; and the elimination of duplication among the USF Libraries.

To bring all members quickly up to speed on virtual library issues and technology, the committee supplemented a traditional comprehensive literature review with a judicious monitoring of mail lists and the Web. Each committee member attended a conference or workshop. While all the conferences were helpful, Cornell University's "The Successful Library" proved to be the most useful for the planning aspects of the project.

The committee laid its first foundation

About the authors

Monica Metz-Wiseman is the virtual library project manager at the University of South Florida (USF) Libraries, e-mail: monica@lib.usf.edu; Tina Neville is the head of reference at USF, St. Petersburg, e-mail: neville@nelson.usf.edu; Ardis Hanson is director of the Florida Mental Health Institute Library at USF, e-mail: hanson@fmhi.usf.edu; Kim Grohs is director of Information and Access Services at USF, Sarasota/New College, e-mail: grohs@sar.usf.edu; Susan Silver is electronic resources librarian at USF, e-mail: ssilver@lib.usf.edu; Edward Sanchez is electronic information librarian at USF, St. Petersburg, e-mail: sanchez@nelson.usf.edu; Margaret M. Doherty is the reference and collection development librarian at USF, e-mail: mdoherty@lib.usf.edu

stone with an analysis of the USF Libraries' electronic infrastructure in relation to peer institutions. The committee-designed survey instrument elicited a mixture of qualitative judgments and quantitative

data from eight peer libraries selected on the basis of ACRL and ARL statistics. Questions concerned electronic collections and services, cataloging available for electronic resources, staffing and budgeting, and details on hardware and connectivity issues.

Since one of the primary goals of the project was to create a user-centered virtual library, the committee next consulted library users. Fourteen focus groups examined user needs, with each group developing an impression of the current use of electronic resources at USF and the perceived electronic needs and desires within the USF community. Participants gave their personal definition of a virtual library and described the kinds of electronic resources and services that they were currently using or would like to access.

Using cluster analysis to examine the results, the committee organized the mass of research data into four sections: services, collection and content, interface and infrastructure, and organizational structure. Over the next four months the committee followed this framework in laying out their plan for the USF Libraries Virtual Library.

The resulting document *The USF Libraries Virtual Library Project: A Blueprint for Development*, reported the research data and identified the project groups that would create the virtual library. The needs and desires articulated by the focus groups were now benchmarks. These benchmarks, reinforced by proposed standards and reachable by long- and short-term actions, constituted the route toward the virtual library.

The implementation process

The press for implementation of the virtual library became so great that the first stages of the implementation process overlapped the last stages of the planning process. A team was already reviewing group purchases of electronic resources for all USF Libraries. In a flurry of paperwork, this team composed

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an evaluation form, a collection development policy, and an acquisitions and processing procedures statement for electronic resources.

A common Web interface was of critical concern so that resources could be mounted, organized, and easily accessed by patrons, both remotely and on-site at the libraries. Each new electronic resource required training and marketing.

These goals could not be attained within the framework of the existing infrastructure or without the leadership of a system-wide coordinator. In March 1997, the library directors named a project manager. The full implementation of the Virtual Library Project was well underway.

To provide continuity, most members of the Virtual Library Planning Committee stayed on, and in February 1997, they convened as the re-christened Implementation Team. Working with the project manager, this team recommends policy to the library directors. The Implementation Team began by writing the charges for the ten teams initially identified in the *Blueprint* that would create the virtual library: interface design, electronic collections, metadata, digitization, marketing, training and staff development, electronic theses and dissertations, electronic reserves, document delivery, and the implementation team.

Preliminaries over, it was time to engage the full participation of the library staff. The Implementation Team presented the plan to staff at each library. At the presentations, they asked staff members to express prioritized interest in joining any of the virtual library teams. Nearly 90 staff members volunteered. The Implementation Team recommended team composition based on interest, balanced representation from each library, and background in public services, technical services, or systems. To ensure continuity with the original virtual library concept, each of the virtual library teams has a facilitator who also serves on the Implementation Team.

With so many people involved in the project, keeping the lines of communication open between the teams could have been a daunting proposition. A virtual library mail list provides ongoing discussions open to all staff members of the USF Libraries. Team Web pages display meeting minutes, progress reports, documents, and forms. Team facilitators present updates at the Implementation Team's biweekly meetings.

The collaboratively created interface, the project's cornerstone, turned out to be one of the most complex components of the virtual library. From the focus groups came two basic themes: provide easy, seamless access to relevant, interconnected resources and enhance the quality of services currently offered.

With this in mind, the Interface Design Project Group divided into four mini-groups: user perspectives, graphic design, Web development, and scripts/search engines. The User Perspectives Group looked at how to best find what was needed, e.g., subject, title, format of materials, and how to enhance services. The Web Development and Scripts/Search Engines groups mapped and navigated the site by maximizing the use of visual cues. Library staff with graphic design expertise created the interface logotype. This new interface, launched mid-November 1997, is available at <http://www.lib.usf.edu/virtual/>.

While the interface was the first and most visible landmark on the road to the virtual library, 1997 saw other significant achievements in terms of both acquisitions and infrastructure development. University and library administrators rallied to the cause. They approved the purchase of OCLC's SiteSearch software, powerful servers, and funded an Interface Designer position to work on the more technical aspects of the interface.

The USF Libraries purchased access to Elsevier Science Journals, JSTOR, Web of Science, Lexis-Nexis UNIVerse, Project Muse, and other significant electronic resources. Additional projects are underway for 1998-99.

The highest priority is the integration of SiteSearch software into the user interface. An "all-in-one" search that will allow access across multiple Z39.50 databases is in the

testing stage. Team members are also expanding the electronic course reserves system, furthering the development of online interactive tutorials, building on digitization projects, and creating enhanced cataloging records. When running at full-tilt, it is difficult to stop and reassess, but the Implementation Team is currently doing just that. An analysis of 1997-98 activities focusing on assessment and outcome is in progress.

After year one . . .

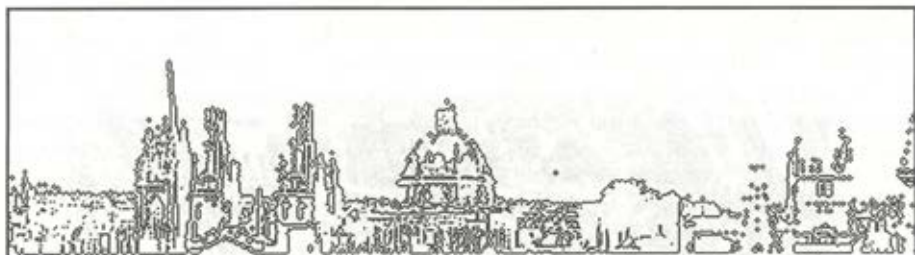
As the virtual library celebrates its first birthday, its successful incorporation into the university's research and administrative structure has been validated with the inclusion of the virtual library as one of six key components of the USF Information Technology Task Force.

Other university task force teams include research, teaching and outreach, technology management, student access services, and health sciences support.

Together, these teams will set the university's technological tenor for the next three-to-five years. While the university is collapsing the recently issued individual plans for a coherent planning document to be issued in the spring of 1999, the USF Libraries are currently involved in user assessment and long-range planning for the virtual library. Topics for the future include the development of individually customized user interface, an expanded role in university-wide information literacy, and electronic publishing programs.

Beyond infrastructure and databases, the Virtual Library Project served as a catalyst for changes within its participants. USF's Virtual Library Project became a collaborative learning experience, a "community-in-practice." Virtual library team members developed strong working relationships with one another that transcended rank, department lines, and geography.

In learning about the virtual library, they also learned how to be members of a larger "community." Organizationally, the transformations within the USF Libraries are paying dividends in the coin of multi-campus cooperation. However, the continued success of this collaboration requires ongoing evaluation leading, inevitably, to additional change and innovation. ■



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