

# EDITORIAL

*Sometimes new technologies foster greater use of old ones*

## Systems, Books, and Delivery Trucks

**The explosion of interlibrary** lending triggered by the installation of a new automated system in the libraries of Westchester County (see “Technology and Teamwork,” p. 160-163) both challenged and reinforced some of the conventional wisdom of librarianship. Old notions of what books and other media would circulate and standard policies for interlibrary lending were transformed.

The story of the experience was truly heartening for this aging editor, long enough in the tooth to get worried and weary when cyberhype gets too deep. Neither technophobe nor Luddite, I do find it refreshing when a technological advance dramatically increases the use of precomputer, decidedly nonvirtual old technologies like books and delivery trucks.

Don't be misled by those reactions. The directors of the 38 libraries in the Westchester Library System (WLS) are as “cutting edge” in their vision of the library of the future as any. My old friend Mitch Freedman, who directs WLS, is the best tutor on new technological developments. Mitch has pushed hard to get Westchester libraries in the technological vanguard. A library card from any WLS library will get a library patron free access to the best array of online information services our information society can offer.

That's why I was so pleased when Mitch told me about the incredible increase in interlibrary lending triggered by the new automated system. It is inspiring to a bookish type to see that they can't keep on the shelves a 1942 title on the crafts of the Iroquois tribe any more than they can buy enough copies of the latest Tom Clancy.

It is deeply reassuring to see the library directors of WLS truly rise to the occasion and let the system tap their popular, highly treasured collections of new videos, DVDs, and print best sellers for lending outside the community of the library that bought them. They even standardized their lending policies to accommodate user-initiated interlibrary reserves. Anyone who has served on any kind of library association or consortium committee knows this is not easy work. The Westchester directors deserve great credit for opening their collections to each other. It is evidence that library cooperation can work to promote and provide better library service. It is that cooperative spirit that has attracted state and county support to WLS.

It is reassuring to find out that library users are actually browsing the system catalog, surfing that online catalog to discover old and new gems in all formats. As Mitch put it, “They like a collection of four million items much better than one of 50,000.” Still, I never thought I'd see the day when patrons would browse in a library catalog and do it online from their homes.

Another comforting aspect of the whole experience is to hear the CEO of epixtech, Lana Porter, lay out a library-centered vision for her firm. It was epixtech that supplied the WLS Dynix system. Her vision makes it part of the company's mission to develop products and services that keep the public library at the center of the information transaction, whether it is via traditional books, e-books, or online databases. Porter, Mitch, and I have no fears about public library survival.

We all believe librarians and libraries will be there to insure that citizens get the full benefit of their public investments in information technology, services, and agencies. They will be there to lend a helping hand in the interpretation of that information and the full utilization of new technologies to make that process faster and more effective.

So there were several very encouraging lessons out of the WLS experience. One such lesson is that new systems help make interlibrary cooperation work and validate our investments in new technology. And by engaging in the process of fully exploiting a new system and cooperatively forging the new policies to make it functional, we make library service better.

John N. Berry III, Editor-in-Chief

## Technology And Teamwork

**AN EXPLOSION** of library use is what happened when the 38 libraries of the Westchester Library System (WLS) changed their policies to allow for the full use of the interlibrary loan (ILL) software on their new Dynix system. These are communities with entrenched habits of reading and library use. Westchester County, one of New York State's most affluent, is the home of 874,000 citizens who have high expectations of their libraries. They get exceptional results, including much higher than average library support and politicians working together from three levels of government (local, county, and state).

WLS is a cooperative public library system chartered by the State of New York in 1958. The law founding the system required that WLS provide ILL services. Directed by Maurice J. (Mitch) Freedman, the system provides economies of scale for a variety of library products and services wherever they can be effected. According to Freedman, the economies have been particularly effective in technical services and cataloging. They have also been effective at negotiating licenses for a huge array of online databases and information sources, all accessible through the use of a WLS library card, via the new Dynix system.

WLS, like other library systems in New York, is subsidized by the state, and is a state government agency. Freedman has been very successful in getting the government of Westchester County to support WLS. The county contribution has grown to \$575,000. "That's a county giving money to a state agency!" Freedman said proudly.

The new Dynix system, sold to WLS by epixtech, is the third automated system at WLS, and epixtech is a new vendor to WLS. "The member libraries pay for the automation entirely," Freedman explained. "They get the economy of scale by contracting with us. They buy the system cooperatively. We at WLS operate and manage it." The libraries pay for the staffing and the costs of operation. The cooperative set-up means Freedman has to be both a manager and a good politician. WLS can't force the member libraries to do anything, so he has to convince them.

The new Dynix system has made it possible for anyone with a WLS library card to reserve books from home, or from any computer anywhere. The system was set up to route the book reserves to the library most likely to have the book in question. When a reserve request comes in, the library holds the book, and it is picked up and delivered to the library nearest the requesting patron (some 42 sites in 38 communities, counting all branches).

The user-initiated reserves were relatively easy to implement. The new system began operation in December 1999. Westchester County has a system-wide catalog that lists all the holdings of every library. Some 800,000 titles in the catalog represent four million items in the 38 collections. When you log on to any terminal in any library you get the full system-wide catalog. You can search by all current state-of-the-art methods.

It is not unique to WLS that interlibrary activity increased with the new system, but the quantitative leap that ILL requests took is certainly news. Before Dynix, reserves—they are called "intrasystem holds" at WLS—had peaked at about 4000 a month. They jumped to 13,000 in the first month of Dynix operation. By June 2000 WLS had experienced five months with holds exceeding 20,000, peaking in that month with 27,000.

However, WLS didn't get to that point easily. The libraries had policy differences. Loan periods had to be standardized, but more difficult than that, libraries had to agree to lend even their brand new best sellers to each other's patrons, along with old and new videos, DVDs, CDs, and every other kind of item.

"The service worked very well for each library's own users," Freedman asserted, pointing out that user satisfaction was the first key to making the new levels of cooperation work. "It turned out that use differs from one community to another. Some towns like certain kinds of books more than others... The ILL borrowing seems to even itself out. No library is losing access to books or service."

Rhoda Gushoe of the small Bedford Hills Library described the changes: "We used to have to help our users a lot with reserves, now they do it for themselves. We miss that interaction, but they are very excited about being able to do it themselves. Many are quite surprised at how many books they get all at once. 'I can't read all those,' they say. The service is wonderful, it is very fast. The fill rate is great. Our books aren't being pulled out of town as much as they used to be..."

## Negotiating the differences

Sure there were tough negotiations, even arguments at the meetings of the county Public Library Directors Association (PLDA). Apparently some gentle pressures had to be applied. Some libraries cut back on the number of copies they bought, relying on the ILL speed to meet their needs. Some librarians were telephoned by colleagues who said, "Hey, you only bought four copies of \_\_\_\_\_, and your people have 40 reserves on it!" Guidelines were implemented, and the libraries agreed to buy an additional copy of a book for every four reserves. "Normal checks and balances are ironing out the few problems we've had," says Freedman, Everyone can tell in the system how many copies any library has bought.

Some libraries wanted to develop "express collections" of new titles that could not be reserved. To do that another policy was developed. The libraries agreed that a library must have one copy available for reserve for every copy they have set aside that can't be reserved. When a library wants to keep some item for its own users, it must buy two.

Some local folks complained to Mark Hasskarl, director of the Chappaqua Central School District Public Library, in Hillary Clinton's new hometown. "We did get some comments about the lending of books to people from out of town. It was used against us in the bond issue election."

Hasskarl was happy with the way it turned out. He commented on the reluctance of some librarians to lend to people from other communities: "As people see how well Dynix is working, their reluctance to lend goes away. After all, they are hurting themselves. Their own patrons now have access to a vast number of books and a vast number of copies, so they get access much faster."

"I met with one very unhappy library board," Freedman reported. "'We bought these books,' they said. 'Now they are going out of town.' I explained how the checks and balances worked and they came around." Freedman attributes the success of the interlibrary borrowing to the long history of cooperation in Westchester County. "The nonresident fees, so common elsewhere in the state, don't exist in Westchester County," he said with pride.

## Popularity Renewed

When the epitech Dynix system triggered the interlibrary loan explosion in Westchester County, among the surprises was the variety of materials that began to circulate and the renewed popularity of older books. Library patrons from all over the county tap deeply into the exceptional AV collections at the Ossining PL. They borrow heavily from the extensive holdings in African American literature and works in Spanish at the New Rochelle PL. Actually, they borrowed books, videos, and CDs in all genres and periods in libraries countywide.

Westchester's public information officer, Amy Small, asked the library directors to share some of the unusual titles that were reserved by patrons. The examples illustrate the tremendous range of borrower interest. They clearly show that the collections of all the libraries in the system have been merged on the Dynix OPAC into a single resource for all citizens of the county through the new automated system.

For example, there were requests for the 1979 title *20 Most Asked Questions About the Amish and Mennonites* by Merle and Phyllis Good (Good Books). *The Morrow Guide to Knots: For Sailing, Fishing, Camping, Climbing* by Mario Bigon and Guido Regazzoni (Quill, 1982) was reserved. One patron asked for Heinz-Sigurd Raethel's *The New Duck Handbook: Ornamental and Domestic Ducks* (Barron's, 1989), and another sought out Pamela Bullard's *The Hardest Lesson: Personal Accounts of a School Desegregation Crisis* (Little, Brown, 1980).

Constantly in transit from library to library is Came A. Lyford's classic *Iroquois Crafts*, published back in 1945 by the U.S. Bureau of Indian Affairs, Department of the Interior. Grace Paley's 1959 best seller *The Little Disturbances of Man* (Doubleday) was also rediscovered. There is new demand for lots of older books like these, delivered one day this summer: Nicholas Blake, *The Widow's Cruise* (Harper, 1959); Philip Wylie, *Generation of Vipers* (Farrar & Rinehart, 1942); Laura Cunningham, *Sleeping Arrangements* (Knopf, 1989); and all the books in the Anthony Powell "Dance to the Music of Time" series, published by several publishers from 1950 to 1975.

Older books for children and young adults have gained new popularity. For example, Westchester borrowers rediscovered Barbara Cohen's *Thank You, Jackie Robinson* (Lothrop, Lee, & Shepard, 1974), Cynthia Voight's *Izzy, Willy Nilly* (Atheneum, 1986), Phoebe Gilman's *The Wonderful Pigs of Jillian Jiggs* (Scholastic Canada, 1988), and, of course, George Selden's *The Cricket in Times Square* (Farrar, Strauss and Giroux, 1960), with its wonderful Garth Williams illustrations.

Every book ever made into a movie is back in demand. In that same summer week, for example, reserves were made for Graham Greene's *End of the Affair* (Viking, 1951), and Patricia Highsmith's ever-popular *The Talented Mr. Ripley* (Coward McCann, 1955). New demand is triggered by any mention by Oprah or on the broadcasts of National Public Radio.

## **Proud to be a lender**

Patricia Anderson, who directs the New Rochelle Public Library, agreed. "We really believe in the system and the cooperation," she said. "It is at the core of the library mission to put books in the hands of people who need them!" Anderson is very proud of the diversity of her community and its deep collections in Spanish-language materials and African American literature. New Rochelle Mayor Timothy Itoni is also a proud library supporter and heavy library user. He likes the idea that the New Rochelle Public Library is a net lender in the county.

"I'm very happy about the system," says Rodney Lee, director of the Mount Vernon Public Library, a designated central library for WLS. "We're seeing titles move here that haven't moved in ten or 15 years-one thing we didn't anticipate. We've had to add a third route to our delivery system. The new Dynix system has made the whole service more efficient than it ever was."

One difference is that under the old system a librarian had to intervene to execute a relatively arduous process. The result was that librarians didn't suggest borrowing from other libraries or offer the service immediately, the way they do now.

## **Lending the good**

For the first time all the libraries have agreed to open up to make available to patrons from other towns brand new books, high demand videos, DVDs, new CDs, and CD ROMs. "They almost have identical loan policies in all the libraries for the first time in Westchester history," Freedman said. "We had 747 item codes in the system, now we're down to fewer than 100, which means cooperation in policy, collection access, and in collection development."

Users are finding new ways to use the system catalog, too. "People are actually browsing the online catalog in ways they never would have when it was in card cabinets," said Wendy Bloom, director of the Mt. Kisco Public Library. "I had a patron who browsed a list of every video title in the county, and she could do it with a couple of clicks."

As one could guess, the WLS delivery service was inundated and forced to add drivers and routes. The delivery service is outsourced. The contractor told Freedman about the increasing workload and more service was added. Freedman expects to add even more resources there as pressure for more deliveries mounts.

Chappaqua's Hasskarl was surprised by the explosion. "The staff are overwhelmed since Dynix," he said. "We used to get 20 to 30 books a day, now its common for us to get 70 to 90 every kind of book, too. It has helped patrons get new books fast, but they have also rediscovered much older ones."

## **Borrowing runs the gamut**

"Our patrons love it and that's the bottom line!" beamed Stephanie Sarnoff, who directs the Scarsdale Public Library. "They use the system from our terminals or from home. The overwhelming majority of homes here have at least one PC. Borrowing runs the gamut new and old, fiction and nonfiction. I was surprised by the amount of older things moving and by the volume. We're bracing ourselves for the fall, when everyone gets back home."

"In November 1999, the first month of Dynix, our total interlibrary loan traffic was 282," reported Edward Falcone, director of the Ossining Public Library. "In July it went up to more than 2300. We used to be a net borrower, now we've become a net lender. Dynix uncovered our AV collection, probably the best AV collection in the county-videos, DVDs, everything-and we're getting, action there.... I'll have to put more resources behind interlibrary lending now."

Probably epixtech's Lana Porter, who has seen new systems installed in other places, and Wayne Hay, the WLS systems librarian who had presided over a new system in an Oregon county, were the least surprised. Hay said the Oregon installation had the same impact. He witnessed the same type of explosion. "People really piled up on one of the Harry Potter books and on a Tom Clancy novel," Hay reported.

From Freedman's point of view the big breakthroughs were as much due to the cooperative spirit among the library directors as to the technology "When they discovered that the service worked better for their own users, it began to work very well," he reported. Now "informal devices and techniques" have developed to convince library directors to commit their resources to support the sharing system. There are ongoing discussions of library policy differences and divergences to be ironed out over charging small *fees* for the reserves when books are picked up (some libraries do, others don't).

## **Old books circulate**

There are new net lenders and more libraries that aspire to be net lenders. Everyone likes the increase in circulation numbers. The most common user feedback is surprise that the books are available so fast. The directors have been able to convince their colleagues to respect the need to share. The best result is that books that had been collecting dust, have been flying off the shelves and that says something about the conventional wisdom on circulation (see sidebar, p. 161). One third of the titles requested were published in 1990 or earlier.

The biggest lesson to Freedman is that when the mechanisms and money are there to support networks and consortia, as they are in New York and Westchester County, library service gets much better. With strong support and cooperation coupled with well-designed technology, libraries can fight off their natural tendency to territoriality, the notion that the books "are our books." As Freedman put it, "We've had a fine lesson in cooperation here. We've learned that a collection of five million is far superior to one of, say, 50,000. We've learned that good technology supports increased use of older but useful technologies, in our case both books and delivery trucks."

"Here in Westchester County the benefits of cooperation are so obvious that no one really opposes it," Freedman continued. "The directors take care of potential miscreants or problems with gentle, collegial pressure. The natural rivalry among the libraries is still strong. Some circulate more than others; some have other strengths. They understand, however, that everyone does better when they cooperate like this."

## Keeping the Library at the Center

The Westchester Library System's (WLS) interlibrary lending explosion was brought about by the installation of the epixtech Dynix system. According to CEO Lana Porter, "We try to help libraries become and remain the central focus of information for their communities. There are so many things out there that go beyond the library, products vendors want people to use *instead* of to the library. We're trying to help pull those resources back into the services of the library, to provide them almost as back office functions, so it is the local library that is still seen as the center of knowledge and information for the community."

epixtech plans or has systems and software to make available and deliver e-books in whatever format they can be used by library patrons. The firm foresees libraries developing customized web sites for library patrons. "Our services and products aim to retain patrons for libraries by giving them the choice of being a cyberpatron, a regular patron, or a hybrid of both," epixtech VP for product management Scott Wheelhouse told LJ.

The epixtech core business is still library systems that include cataloging, patron access, and circulation modules along with extensions for acquisitions and serials and the interactive capability to connect to and use the Internet. "We have the largest installed user group in the world, over 2600 customers. Many of them are large consortia, like the 38 libraries in Westchester County," Porter pointed out. "We're still putting money into development of Dynix (the Westchester system), and we'll continue to provide enhanced additional features and capabilities." The firm's Horizon system serves the academic library market.

As things change epixtech plans to be there with new services and products. Wheelhouse says the "drivers" of that tradition that change are Internet delivery of information, the growth of online content, the personalization of information services, and patrons achieving ubiquitous access to it all.

In the future, Porter expects resource sharing to continue to grow. She is certain libraries will work out the policies to allow it happen. "We'll concentrate on what we can do to help library staff manage time to work with patrons, to do the important library work... We also look at how the patrons are changing, what needs they will have. We want to make sure that the services and products we offer will be what new immigrants, children, senior citizens, and all the patrons will want or need. Porter has no doubts about the library's ability to adapt, and thus survive: "The e-library has such a strong tradition that it will never go away."

### "We'll need librarians"

Porter disagrees with the many information providers who believe that they must go direct to the consumer. "Information is really like any other product," she explains. "You have to look at your distribution channels. A consumer model works well for some things, but we still have to have someone who can help people locate, analyze, discern and decipher the information we deliver. People need a librarian to point out the limitations of an information source, its idiosyncrasies. We'll never lose that need..."

"We need to be sensitive to the fact that many people don't work normal hours and can't get to libraries when they are open" Porter said, discussing challenges for the future. "Over 25 percent of the people work second and third shifts or weekends. We'll need systems that make libraries available remotely, seven days a week, 24 hours a day." That 24/7 approach also includes integrating products from other institutions and companies into the system. "The librarian, in whatever job (cataloger, acquisitions, reference service) shouldn't have to go into several different systems to get one task done."

"We'd like our systems to provide library administrators with data to help them make buying decisions, too," Porter continued. "We can deliver information on patterns of use of books and other media. We can quantify the kinds of material most popular in Westchester County and throughout the nation. This could help libraries forecast and plan their acquisitions and even help publishers make decisions about what to publish."

### Selling books

"We expect to be able to let a library sell a book to a patron" Porter explained. "When a library user checks and finds that it will be six weeks before a copy of a new Danielle Steel novel will be available, we'd like that patron to be able to buy the book, through the library, by making a few keystrokes on our system. In other words we'd like to allow the library to sell the book to the patron." In new epixtech systems libraries will be able to transmit their patron book purchases to any local bookseller.

### Don't buy, subscribe!

Porter sees epixtech moving fast to become an application service provider (ASP). She admits it is an outsourcing model: "Being an ASP makes epixtech a service bureau. We own the hardware, the server, and maintain the application software. We provide everything under a contract or subscription." When asked about the cost to a library, Porter was enthusiastic: "It is actually much cheaper for the library, because the library doesn't have to make the capital investment or hire the technical staff."

"A library could easily spend \$100,000 or more for a new stand-alone system," Porter asserted, and much more to operate and maintain it. "If they subscribed to the ASP model they might spend \$50,000 over three years. That's a tremendous saving."

Porter warmed to the subject: "Technical staff people have become very scarce. Libraries cannot afford to pay them competitive salaries." The firm already has one ASP system in operation. It includes five libraries using a system under a subscription. The libraries decide their own content, said Porter, who thinks the service will be an "an important option" for smaller libraries. She said the company would "probably" sign contracts on 20 ASP subscriptions before the end of 2000.