

## **WLS Trustees' Institute – WESTLYNX Past, Present & Future**

This is an accounting time, and a time to project into the future for the most successful cooperative automation project undertaken by any public library system in the State of New York. It was not always so.

In the mid-1980s when Stan Ploszaj and I were going from library to library to help directors convince their Boards of Trustees and local officials that participating in a shared automation program would be cost-effective and a good investment, there were numerous questions and concerns.

### **I. WHERE WE HAVE BEEN**

#### **1. Viability Questioned**

Some of the questions focused on the viability of the overall enterprise. Did it make sense for libraries to throw in their lot together for such a program? What would become of their identity and autonomy?

#### **2. Costs Questioned**

Other questions focused on costs. How would they be controlled? How would they be accounted for? How many libraries would it take and how much of a financial commitment would be required to successfully underwrite the system?

#### **3. Other Viability Questions**

Lastly, another question of viability arose. What is WLS's ability to manage such a project? For example, what did WLS know or how would it learn to manage a project of the potential scope of what became WESTLYNX? What control would the libraries have over the project?

Let us quickly answer some of these questions--which were addressed in part by Joan Silverstein and Patricia Anderson. And then we can examine how we propose to proceed in the future.

#### **1. Viability Answered**

Regarding the idea of a cooperative enterprise, economies of scale have worked most successfully for the public libraries of Westchester County. With the smallest and cheapest stand-alone systems costing about \$100,000 each, the libraries have gotten an incredible bargain for their \$11,000 per terminal share capital investment.

Libraries with one or two terminals are getting access to a system which already has close to \$2,000,000 invested in it. Even the largest libraries, those with five or more terminals, have the benefit of online access to a database of the holdings of virtually all of Westchester's public libraries, i.e. 3.5 million items representing about 650,000 bibliographic works.

This database is the aggregate of the materials found in each public library in the County. It was amassed in machine readable form from WLS's processing of member library books since 1977; converted to machine readable form from the holdings found in the Countywide Union Catalog located at WLS with over \$350,000 in State and regional automation grant funds won by WLS; and holdings of individual libraries that have been added or deleted with the installation of WESTLYNX locally. Countless years of labor and expense have gone into the amassing and maintenance of this database, the single irreplaceable component of the WESTLYNX project.

Getting back to the hardware, the two megabucks of investment include, too, central site computer equipment which is famous for its non-stop and transaction processing excellence in the New York Stock Exchange as well as the Westchester Library System. Approximately \$1.3 million has been spent on TANDEM computer equipment, another \$350,000 on Racal-Milgo's DCA telecommunications network system, and about \$125,000 on central-site construction costs.

In addition dual air-conditioning units were purchased, either of which could sufficiently cool the machine room. And a fine conditioner/battery back-up unit was purchased which will ensure an orderly shutdown of the computer's operations in the event of a massive power failure. This will prove invaluable as we are now entering the summer brown-out phase of life.

In sum there is a powerful computing facility, a telecommunications network -that was state-of-the-art when it was purchased three years ago, and powerful peripheral equipment that will ensure the proper functioning of these two systems under the most trying environmental conditions.

We believe that the concerns of autonomy have been successfully addressed. The database differentiates each library's holdings, while at the same time provides access to any user at any terminal to the holdings of all of the libraries. Of course what materials can actually be borrowed by any given patron are subject to local restrictions.

Each library still registers and maintains its own patrons and files. It is crucial that all of the libraries share the patron information, but the files have been established so as to ensure the local library's control over its local borrower's use.

As to the identity, nature and character of each library, the parameter process--a painful one for each library and most definitely for WLS--saw each library clearly specifying precisely what data it wished to collect about each patron, and how its local holdings would be stored, treated and displayed.

Within the limitations of the system software, the libraries were able to make a number of decisions regarding these parameter choices that well reflected local needs. With the new system to be procured, this parameter process will have to be repeated in significant part. But we have the benefit of experience to guide us in making decisions this time, and we hope and trust that where possible a little more uniformity will prevail.

## 2. Costs Answered

The mechanism of a contract between WLS and each member library was employed as the basis for assuring the financial solvency of what has become known as the WESTLYNX system.

The contract stipulated the capital, telecommunications and maintenance costs for years one and two. It also stipulated what the increases would be in telecommunications and maintenance charges after the first two years of the system's operations.

To refresh everyone's memories about the funding, the basic numbers were as follow:

- \$11,000 per terminal share, capital cost
- \$ 1, 100 per year per terminal share, maintenance cost (years I & 2)
- \$150 per month per site (16 terminals or less) telecommunications charge up to \$2,200 per year per terminal share, maintenance (year 3)
- \$205 per month, telecommunication charge, based on actual billing (beginning year 3)  
from phone company

There was a modest 5% increase for 1991 in the maintenance charges, for a total of \$2,205/year, and the monthly phone bill went up \$5 per month to \$210.

Facing the issue of costs, the capital financing and long range stability of WESTLYNX are as assured as a substantial bank account permits. As of May 10, 1991, the WESTLYNX Capital Reserve Fund held about \$307,000. And the 1991 operating expense budget of \$576,000 was offset by a projected \$578,000 in 1991 operating income. It should be clear that WESTLYNX is self-supporting.

Note that almost half of the \$307,000 capital reserve is a result of the negotiation of the termination of the Utlas contract which permitted WLS to only pay Utlas \$30,000 of a \$180,000 balance owed to Utlas--a net of \$150,000 saved and turned over to the WESTLYNX Capital Reserve Fund.

Everyone is fully cognizant of the deepening financial straits that all libraries face. Every effort will be made to minimize or keep to zero any increases in the maintenance charges.

Lastly, the question of how many libraries and how much money would it take to establish WESTLYNX needs to be answered. For the oldtimers, our dream was to sell 100 terminal shares and get 15 to 20 libraries to sip up so that we could raise a million dollars.

As it turned out all 38 public libraries in Westchester County, plus the Bedford Hills Correctional Facility, are participating members of WESTLYNX. There are currently 44 WESTLYNX sites and about 220 terminals online to the central site TANDEM computer facility, a success beyond everyone's dreams.

The economies of scale alluded to should include also some indication of the specific service improvements achieved with the installation of WESTLYNX in the public libraries of Westchester County.

- a. The libraries in Mount Vernon, New Rochelle, Harrison and Scarsdale were once and for all delivered from the fear and trembling occasioned by their use of the antiquated and non-supported Bro-Dac circulation systems. Parts for the equipment were no longer manufactured so replacement parts had to be cannibalized from spare or unused units. For these libraries WESTLYNX was not an option but a necessity which had to come as quickly as possible.
- b. Such libraries as the ones in Greenburgh and Yonkers relied on a microfilm based photocharging system that used the town's computer. Greenburgh was desperate for WESTLYNX because of the incredible labor costs required for the mailing of overdue notices. The intensity of the work effort coupled with the attendant untimeliness of the notices led to headaches for the staff and the public. I believe that the photocharging institutions are thrilled with the efficiencies and economies of WESTLYNX.
- c. Such local small libraries as the one in Bedford Village which hand-charged books to its patrons by writing the patron's name on the book's charge card were not as thrilled with the automation of a personalized and simple process. On the other hand the access to the detailed holdings and shelf status of every public library's collection, plus other features of WESTLYNX helped lessen the blow of the machine's impact.
- d. Most, possibly all, of the hand charging/Gaylord-based libraries were happy to eliminate the perpetual sorting, re-sorting, and extracting of charge cards, letting the computer do all of the work. Overdue notices to borrowers who were registered at other libraries necessitated daily phone calls to the borrowers home library for their correct name and address.

WESTLYNX put an end to all of this tedious and labor intensive clerical activity which was carried out by probably the overwhelming majority of libraries in the County.

In sum the economic viability and operating efficiency of each of the local libraries circulating with WESTLYNX was assured in one or more respects by the overall success of the WESTLYNX system.

### 3. Other Viability Issues Answered

As WLS's chief executive, one offers that WLS has done its part in the successful nurturing and management of the WESTLYNX project. It is wrong however to assign all the credit or all the blame to WLS.

From the very start WLS promised and has endeavored to provide the leadership and expertise in the management of the overall automation enterprise. It is also true that from the very start the Public Library Directors' Association's Automation Committee and its successor the WESTLYNX Users' Group Steering Committee, have worked closely and constructively with WLS to assure that member library concerns and interests, operational costs, considerations, and activities, and overall automation goals and objectives were regularly reviewed, revised or met.

I am proud to state that all decisions to date have enjoyed a broad and consistent consensus of member library, WLS staff and WLS Board support. It is important to note, also, that arriving at the consensus sometimes involves intense and heated discussions. There have been and there will be no rubber stamps. The success of the project to date is something that everyone has contributed to, and something with regard to which everyone can take pride.

In terms of some specifics regarding WLS's management of the project, the WESTLYNX growth (220 terminals versus the original projection of 100 terminals; 44 sites versus the 15 or so originally contemplated) has required major adjustments in the WESTLYNX operations staff and the central site hardware.

To maintain a 7-day/76 hour per week library opening schedule, 4.8 fulltime equivalent operators are required to be on site 94 hours per week. The .8 portion includes three parttimers who are used primarily for filling in evening and weekend hours. The project manager, Stan Ploszaj, has a master's degree in library science (as well as medieval history), and came to WLS after managing the automated system serving the state college libraries of New Jersey.

Stan has overall project responsibility, but on a day-to-day basis he works to ensure that all of the hardware is up and running properly. We are in the process of filling the lead operator position

with someone who is an expert in TANDEM computing, as well as managing computer operations; and filling a Tech Operator position (the number two operator) with someone who will be able to fix terminals and PCs and solve telecommunications problems when the hardware is at fault.

It became clear to the Users' Group and to WLS that because of the rate at which libraries were being brought online and the quality (or lack thereof) of the documentation and training provided by Utlas, a fulltime person would be needed to work on training the member library staffs and to write additional or supplementary documentation.

Barbara Blanchard was hired to be responsible for the application, that is, for training and documentation, and for fielding and responding to user problems, system bugs, and handholding as necessary. Barbara had extensive customer support experience with IBM, and other for-profit companies. This expertise, coupled with her in-depth library training (a master's degree from Rutgers library school) and professional experience, have served WESTLYNX users well.

Barbara will have a pivotal role in working with the vendor selected to replace Utlas and the WESTLYNX Users' Group to ensure that the new software is optimally implemented for each and every library.

As to the ongoing decision process, Stan, Barbara, and I meet each month with the Steering Committee, and have one or more meetings each month with different subcommittees or other bodies of the WESTLYNX Users' Group. Virtually all major decisions are approved first by the Steering Committee, then the full Users' Group, and only after these approvals, such matters are brought before the legal authority for WESTLYNX, the WLS Board of Trustees.

The WLS Board has never had a WESTLYNX issue brought before it that has not enjoyed the overwhelming endorsement of the Users' Group. One should be reminded that the WLS Board of Trustees is comprised of 15 trustees representing the 38 public libraries in the County. Most of the trustees serve on (or have served on) local library boards as well as WLS, and make it their business to attend at least some of the board meetings of the library or libraries they represent.

This arrangement of shared management and direction provides both the ongoing review and participation necessary for the success of WESTLYNX while at the same time not inhibiting or paralyzing the need for forward movement, decision-making and growth.

I trust that some of the historic and present questions and issues have been addressed satisfactorily. This is all a prelude to where we are with regard to system selection and where we are going.

## II. WHERE WE ARE NOW, AND WHERE WE WILL BE GOING

On November 15, 1987, the Westchester library System signed a contract with Utlas, Inc. for the purchase of an automated system which would include online circulation, online public access catalog (OPAQ, acquisitions, electronic mail, interlibrary loan, and materials booking subsystems. The contract was the conclusion of an intensive and extensive multiyear period of system analysis and design which culminated in a book length Request for Proposal bid process, and subsequent negotiation with the two most qualified bidders.

WLS staff and the PLDA Automation Committee worked extremely long and hard to ensure that a balance of the best system, the best hardware, and the best price was achieved with the vendor selected. As noted above, consensus was achieved. Utlas's parent company, International Thompson assured WLS of its long-term commitment to Utlas, and in turn to WLS.

As it turned out the particular Executive Vice-President of Thompson was basically good for his word, but his successor felt no such commitment.

Without jumping too far ahead, the Utlas system was installed beginning in the Spring of 1988, and the first library was brought online in August of that year. Remarkably, Stan and his staff brought up another 15 (or so) sites by January of 1989, doing most of the telecommunications implementation work themselves.

The Utlas circulation system has run relatively well, the only continuing problem being with the holds or reserve function. This is relatively bug-free at present, and seems to be doing well.

Where Utlas disappointed was in the delivery of a viable and sound online public access catalog (OPAQ. Having promised the OPAC software as early as January, 1988, and as late as February, 1991, Utlas finally delivered a defensible OPAC product in March, 1991, much too late for WLS to even contemplate installing it. This Utlas release was being delivered at the same time the corporate management was negotiating the shutdown of Utlas's business and the sale of its local system operations to another vendor.

It made no sense to WLS in 1991 to invest another penny in enhancing a system it was going to be repladng.

Many of you will recall that WLS prepared a paper entitled *WESTLYAW: Preliminary View of Options*, dated October 18, 1990. This paper was, written at the time WLS was first notified of Thompson's intentions to dump Utlas and get out of the circulation system business. At tonight's juncture, the WESTLYNX Users' Group Steering Committee and WLS staff have made a number of choices and recommendations concerning where we should be going with the WESTLYNX system, thus dramatically narrowing the options and alternatives discussed in the *Options* paper.

Rather than rehashing that paper, what I will do is outline how the Steering Committee and WLS staff arrived at the conclusions we have reached as of this date.

Although listed as an alternative we quickly rejected the option of indefinitely running the Utlas software, primarily because of Utlas's failure to provide a defensible OPAC an ILL system or a materials booking system in a timely fashion.

#### A.. Do We Keep the TANDEM Equipment?

Thus the first real issue that needed to be resolved was whether WLS should migrate to the best system available regardless of its hardware platform, or the best TANDEM-based system. This was a crucial question that had to be answered before any further decisions could be made. We opted for the best TANDEM-based system because of our study of the second-hand computer marketplace.

By early 1991, WESTLYNX had purchased approximately 1.25 million dollars worth of TANDEM equipment. If WLS decided to purchase a system that ran on DEC, IBM or on other hardware than TANDEM, we could expect to recoup approximately \$350,000 of our \$1.25 million dollar investment. Coupled with the availability of two library systems, CARL and AMERITECH, each of which held out strong promise for WLS and major improvements over the Utlas software, we opted to keep our investment in TANDEM.

Note well that the TANDEM CLX computers that WLS owns were state-of-the-art parallel processing non-stop equipment when first released in 1988, and that WLS had one of the first of the CLX line in the New York metropolitan area.

#### B. Now That We Keep the TANDEM Equipment, What Next?

##### **CARL**

There are only two systems currently marketed that run on TANDEM computers. One system is owned by the Colorado Alliance of Research libraries. It has been incorporated since 1978, and it created a for-profit corporation known as CARL Systems Inc. in 1988 to market its system and services in the library sector. The Alliance developed what is known as the CARL system, and it includes the University of Colorado, the Denver Public library, Colorado State University, and the University of Wyoming.

Among the customers of CARL Systems Inc. are the Montgomery County Department of Public Libraries, the University of Maryland, Arizona State University, Northeastern University, the University of Hawaii, the Solano and Napa County (California) public libraries, and the Sno-Isle Regional Library System (a consortium of libraries in Washington State).



Two salient and related points should be made regarding CARL

(1) CARL now maintains the Utlas software which runs on WESTLYNX, having taken over all of the Utlas accounts; and (2) CARL offered its complete system (circulation, public catalog, acquisitions, electronic mail, etc.) to all Utlas accounts at no charge, Le for free. (CARL indicated that there will be a training and installation charge that will not exceed \$35,000.)

Appended to these remarks is an evaluation profile that lists the key features in priority order upon which the final decision will be based for selecting the CARL or AMERITECH systems. Rather than review these features one at a time, selected salient traits will be discussed.

CARL's greatest strength is that it is a mature system with full operational functionality. There is always more that WLS and the WESTLYNX users would like to see, but unlike Utlas there are a full-functioning and operational circulation system, OPAC, acquisitions system, and electronic mail functions running on CARL systems all over the United States.

Although authority control, ILL and materials booking are important and sought-after functions, the operational availability of OPAC, acquisitions and electronic mail will have strong, positive and potentially immediate and long-term impact on local library operations. Those libraries which have set aside funds for OPACs could realistically expect to install and operate online public access catalogs for staff and patrons in 1992.

Those libraries which wish to use existing terminals for online catalog functions will be able to do so once the CARL system is installed.

CARL verbally has estimated that if WLS makes a decision in its favor reasonably soon, the CARL system can be fully migrated to and operational on the WLS TANDEM computers by June, 1992. This assumes that the transition planning and parameter work would begin no later than the Fall of 1991.

The CARL system has been judged by the WLS staff and the WESTLYNX Users' Group Steering Committee to be superior to the Utlas system in terms of functionality, in terms of the efficiency with which it will run on the TANDEM computer, and in terms of its greater capacity for telecommunications. Or more simply, CARL will permit a far better response time because its programs require far less machine utilization than Utlas's, and CARL's software is written so that 16 terminals can be supported by each TANDEM communications controller rather than the 4 per controller supported by Utlas's software.

In addition to its greater functionality and operational efficiency with respect to Utlas, CARL is the only local system vendor that provides a gateway to a raft of machine readable databases including ERIC, InfoTrak, WilsOnline, etc., to the online holdings of all of its user libraries, and—for a fee—to its own UNCOVER database of keyword, author and title page indexes to 10,000 regularly published periodicals and serials in the English language.

CARL has set up its system to facilitate home dial-up use of these databases via the local library gateway. With software already written and in use which will permit the home (or library) user to search the local library's database, the commercial databases, and search and purchase facsimiles of articles in the UNCOVER database, it is way ahead of all other local system vendors in end-user and dial-up support. CARL's software already provides for the dial-up customer's input of credit card payment for fee-based services.

The database searching and dial-up capability are important niceties of the CARL system that will have more and more value to Westchester users in the 1990s. However in concluding this discussion about CARL, it is crucial to note that our overriding concern is that CARL has fully functioning software in the areas of highest priority to the WESTLYNX users.

A last note regarding CARL Systems Inc. is that the majority of the company is owned by the Colorado Alliance of Research Libraries. CARL Systems Inc. also has a contract with the Alliance to operate the computer installation upon which the Alliance's system operates. It is our judgment that the commitment of the Alliance to CARL Systems's future is by necessity strong and in many respects a deeper commitment than is possible by for-profit vendors.

This judgment is buttressed by the four decade history of committed cooperation and support of Colorado libraries. The other vendors in the library sector may have greater financial resources or customer bases, but several are owned by conglomerates who have demonstrated impatience with the profitability of their subsidiaries or are dependent on new sales to pay for current operational costs.

Our preliminary analysis tends to support the view that CARL Systems Inc.'s current operations are wholly supported by maintenance income and are not dependent on new sales. The marketing arm of CARL Systems Inc. does require new sales for its support--a reasonable incentive for its marketing staff to add customers.

It is important to note that CARL Systems Inc. is the firm that purchased Utlas Inc. from International Thompson. CARL provided a written guarantee that it will maintain the Utlas software for the period of one year, beginning April 1, 1991, at the same prices charged by Utlas. It also provided that any Utlas customer can have the complete CARL system free of charge, and for a not-to-exceed \$35,000 training and installation charge.

## AMERITECH

AMERITECH is a *Baby Bell* serving several midwestern States including Ohio and Illinois. It is a huge conglomerate that has dozens of separate Dun & Bradstreet code numbers for its Information Systems family of companies. (This is not hyperbole—a search of the D&B database clearly demonstrated this fact.) In January, 1991, AMERITECH purchased the Tacoma Public Library's Alice-B online system.

The Tacoma system currently has a fully functional circulation and inquiry system but does not have an OPAC or ILL function operating at this time. Of super critical concern to the WESTLYNX Users' Group is the fact that the Tacoma system was not written for a library cooperative, but for a multi-branch single library system. As a result, the entire system must be enhanced or re-written so that it can serve a WLS-type consortium.

AMERITECH's best estimate as of this time is that its consortium version of the Tacoma software will be in Beta-release in January, 1992, and in final release in March, 1992. Having had extensive and very bad experience with Utlas's predictions of software delivery, and having experienced several communications that have tended to underscore the tenuousness of the estimated delivery dates, WLS staff and the WUGS Steering Committee members are especially leery about the due date.

A deep concern of ours was that if AMERITECH was selected over CARL and badly blew its delivery of a completed consortium system, WLS could be in the position of having its maintenance service canceled by CARL or CARL's maintenance charges substantially increased.

On top of all of these problems, AMERITECH is offering its system at a substantial price. Depending on when price was discussed with AMERITECH, the cost of the system offered is either \$80,000 or \$40,000. Either price includes a substantial effort by WLS staff in working with AMERITECH to design and implement the consortium features in the Tacoma software. Note that no such effort is required by CARL as it was written in the consortium mode at the outset.

The training and installation fee for AMERITECH is \$30,000.

The other salient, albeit negative, feature of AMERITECH's system is that it will require the up-front purchase with WESTLYNX funds of approximately 130 PCs at \$1,000 each, a total of \$130,000. This has to do with the Tacoma system design and its heavy reliance upon PC processing in the circulation mode.

This seemingly stacked deck against AMERITECH would seem to give rise to the question why we considered the Tacoma system at all. The answer to that question is that when the Tacoma system was demonstrated to the Utlas Users' Group last November, the three WLS staff and the two WUGS representatives agreed that it was the best that system they had seen and technically its use of the PC was extraordinarily innovative and user friendly, especially in the most important area, the circulation function.

Stan and I met with Tacoma and AMERITECH representatives in January, 1991, and had been given to understand that AMERITECH would work promptly and closely with Tacoma to get the consortium software written. An estimate was given at that time that only three months would be required for the rewriting, and WLS was pressed to begin a process of commitment to AMERITECH that would begin with a Tacoma/AMERITECH presence in Westchester, in February, 1991.

From our perspective AMERITECH was not prepared to move anywhere near as quickly as it indicated it would in January. Further, having dealt extensively with a company owned by a conglomerate, the need for, and the dubiousness of the conglomerate's commitment to its subsidiary led to a wariness or disbelief--be it fair or unfair--when AMERITECH's representatives claimed the parent company's deep commitment to this project. (Thompson's commitment to Utlas Inc. lasted three years, and would have ended in 1990, had we not written as escape-proof a contract as we did.)

## CONCLUSION

On June 12, 1991, the WESTLYNX Users' Group Steering Committee unanimously voted

... to recommend the purchase of the CARL System subject to CARL satisfactorily supplying the requisite information and documentation concerning unresolved questions and issues, and subject to the negotiation of a satisfactory contract.

This recommendation was based on the Evaluation Profile document referred to above and attached to this paper, and for the array of reasons evident in the respective discussions of CARL and AMERITECH, above.

CARL's requirement of comparatively tiny outlays of cash and staff time, are overwhelmingly in CARL's favor.

Because of Utlas continued failure to meet so many of its software commitments, we were extremely wary and pessimistic about AMERITECH's estimate of software delivery next year, while at the same time thrilled with the knowledge that the CARL software is and has been ready for installation since the beginning of this examination process.

The assurances of AMERITECH that it would guarantee five years of maintenance of the software were a sincere effort to demonstrate its commitment to its circulation system product. Unfortunately our experience with International Thompson's abandonment of Utlas tended to weaken our appreciation of AMERITECH's offer of support.

CARL's being owned by Colorado's leading libraries appeared to us to offer a more permanent commitment to the support of the CARL system than a conglomerate's commitment to a subsidiary company seemingly marginal to its business. Our dealings with NYNEY, another *Baby Bell* (our *Baby Bell*), and its subsidiary, New York Telephone, further promoted negativity with regard to AMERITECH.

The delays in AMERITECH's start-up, as based on our January conversations, along with these other factors, gave birth to the fears and concerns enumerated, and ultimately played a significant part in the consensus reached and evidenced by the above resolution to acquire the CARL system.

### **Where Do We Go from Here?**

The next step is for the full WESTLYNX Users' Group to act on the Steering Committee's recommendation. The Users' Group meets this Thursday, June 20th, in Pound Ridge, at the Hiram Halle Memorial Library. If the Users' Group approves the resolution, then it will be brought before the WLS Board of Trustees for formal approval at the WLS Board meeting, June 25th.

If approved by the WLS Board, we will begin' negotiation with CARL Systems Inc. of a contract to purchase, install, provide training for and maintain the CARL system. The contract will follow a process similar to the one followed by the above recommendation to purchase CARL, and for that matter the highly participative process involved in the purchase of the Utlas system.

### **Concluding Thoughts**

We know that the Trustees of the member libraries have deep concerns about the economic viability of their own libraries as well as of WESTLYNX We hope that we have demonstrated the fiscal strength and viability of WESTLYNX, both short and long-term.

The solvency of the Capital Reserve Fund virtually assures that the ongoing hardware replacement and upgrade needs will be met without additional charges to the users. The capital costs for OPAC terminal shares are estimated at \$5,000, a substantial reduction from the \$11,000 per terminal charge for full-function circulation terminals. Every effort will be made to avoid any increase in maintenance charges. Contracts were signed with New York Telephone that should preclude any increases in telecommunication charges for existing lines.

Not even mentioned was the additional \$85,000 in the Local Library Aid Escrow Fund. This money was set aside in the late 1970s and early 1980s for the specific purpose of helping the WLS member libraries automate. It is currently earning interest and can be spent at the discretion of the member libraries in support of any automation-related project designated.

Coupled with the previously referenced \$307,000 in the Capital Reserve Fund, WESTLYNX has a total of \$395,000 available for capital expenditure (as of May 10, 1991.)

We are proud of several things:

1. That overall the project has been so successful.
2. That even with Utlas's demise, WESTTANX is still operational, all of the libraries circulating books continue to do so, and there has been no downtime or negative consequences occasioned by the seamless transition from Utlas's maintenance of its software to CARL's maintenance of same. If anything, it has improved. The status quo was unaffected.
3. That all 38 public libraries are participating in WESTLYNX; it is the only automated system in New York State in which all member libraries of a cooperative public library system participate.
4. That even with Utlas's demise and its failure to deliver a satisfactory OPAC, WESTLYNX has functioned and prospered and all but two libraries are or soon will be circulating books on WESTLYNX
5. That the partnership and cooperation between the WESTLYNX Users' Group and WLS staff has led to a combination of success, problem resolution and lack of rancor which could serve as a model for other cooperative library projects in the State and elsewhere.
6. That so many libraries were brought online and began circulating materials in such a relatively short period of time. To our knowledge no other institution, library branch system or cooperative system has successfully installed so many sites in the time frame achieved by Stan Ploszaj, Barbara Blanchard and the WESTLYNX operators.
6. That we have a well-thought-out path for migrating to a full service system with CARL; it is at a minimum of cash and staff expenditure that will meet our needs for the foreseeable future, and open up the potential for home and other non-WLS library use of WESTLYNX. The opportunity is exciting and will contribute further to the long-term viability and expansion of the WESTLYNX system and services.
7. That the staff of each and every public library in Westchester County worked so hard to successfully install and operate WESTLYNX No matter

what WLS staff and the various WESTLYNX Users' Group committees contributed to the project, the ultimate success at each site was a result of the hard work and dedication of the staff at each public library.

Maurice J. Freedman, Director  
Westchester Library System  
*June 19, 1991*

Attachments

WESTLYNX Software Evaluation Profile  
WESTLYNX Online Circulation Progress -- June 1991  
*ON CARL; the Quarterly Newsletter for CARL System Users, Spring 1991*