

The NC LIVE Project: Beginnings

ABSTRACT: Librarians are finding new ways to provide materials for their patrons. Historically the approach to provide access to more materials has been through a series of resource sharing means. North Carolina has taken the approach one step further by developing a consortium for the people of the state called NC LIVE, North Carolina Libraries and Virtual Education. Using the Internet as its medium, the project allows direct access to full text databases, newspapers, and encyclopedias. As former State Librarian Sandy Cooper stated, "Getting information is vital to us in our education, our work, and in our daily lives. NC LIVE makes sure that economic and geographical barriers don't exist for people who need that information." (**Grossman, 1998**)

North Carolina librarians have long been innovators in getting materials for their patrons. Rural communities and economically challenged areas have not had the advantages of the more wealthy areas of North Carolina. With costs rising for materials new means of resource sharing have been developed. NC LIVE was the result of that need coupled with new technological opportunities and librarian's imagination.

How could a library in the 90's provide services for their patrons while dealing with rising inflation rates? With the median cost of serials rising 169% from 1994-1999, there was no way that the average library material budget increase of 7% could compensate. (**Hoffert, 1998**) With these prices escalating, less could be bought and libraries were being forced into searching for creative ways to deal with the problem.

Historically the approach to provide access to more materials has been through a series of resource sharing means. Academic libraries entered into agreements with other libraries that would allow them to freely share each other's resources through Interlibrary loans. As these agreements evolved consortium

were created. This approach made good sense because all of the participating libraries benefited from the shared titles thereby enhancing their own holdings. **(Potter, 1997)** To expedite this procedure, the library consortia had assisted in the formation of union catalogs. Products such as OCLC's Online Union Catalog simplified the search for materials among the cooperating libraries. As technology flourished, there was a change in the meaning of the term, "resource sharing." It came to mean the sharing of computing resources through online bibliographic information which allowed users to locate a book at another library, place a request online for that item, and have it delivered to the participating library, usually through a courier service. In the case of periodical literature, the telefacsimile allowed the borrower rapid access to a particular journal article.

The Triangle Research Library Network (TRLN) in North Carolina is an excellent example of what cooperating consortia can accomplish. Historically, the foundation was laid for this cooperative effort in 1933. Initially only the University of North Carolina and Duke University were involved during this time period of the great Depression. They needed to find a way to overcome their budget reductions and to improve the standing of higher education in the south. They were very successful over the next six decades, doubling from a two-member organization to one encompassing the original libraries with North Carolina State University, and North Carolina Central University. The goal was to increase collection access in the area and to avoid duplication of resources. Dominquez says that,

Librarians can achieve these goals by developing cooperative programs that build interlocked collections. This strategy extends

the number of unique titles available to users. Materials that librarians at one institution cannot afford or thinks are inappropriate may be available from other members of the consortium. This approach also minimizes unnecessary duplication of materials. By coordinating their collections, librarians do not need to duplicate specialized research materials and can use their funds to buy titles that are more central to academic programs and collection strengths.”

A comparison of the records held in the TRLN system indicated that 76% of the titles were held on one campus only and that only 7% were common to all.

(Dominquez, 1993) When we consider that we are talking about nearly twelve million volumes, the number of unique titles is impressive.

With the growth of information technology and the inability of library budgets to keep up with the demands of library users, new library consortia evolved in order “to combine their purchasing power and win better deals.”

(DeLoughery, 1996) Library funders look at this as a type of transformational budgeting where the library chooses to work cooperatively with others. William Gray Potter (University of Georgia) observed that,

Libraries are forming alliances for the purpose of identifying and addressing common needs arising from developments in information technology, especially the growing importance of the Internet and the World Wide Web. Specifically it is becoming increasingly possible to offer a variety of electronic resources across the Internet. These resources include abstracting and indexing databases, the full-text journals, the full-text reference works, large collections of literary text, and extensive sets of digitized images. **(Potter, 1997)**

The consortium recognized that providing electronic resources is expensive and that by negotiating as a group they get more value. Small libraries simply can't afford multiple database licenses so joining a consortium has been a useful strategy. Of course there are several drawbacks to this. Small libraries do not have

much say in the decision as to which databases are purchased. Still the gain is enormous since they receive far more than they would be able to get if they purchased the databases separately. Consortial decisions reflect compromises among the members. Participating in consortial decision-making takes additional time and effort, both scarce commodities in many university libraries. **(Webb, 1998)** Also the membership fees may be quite substantial and the licensing issues need to be dealt with.

As the number of consortia grew, discussion groups began to share the problems they faced. They were concerned with pricing of resources, negotiating for the best terms, problems with infrastructure, funding strategies, and governance to name a few. Out of these discussions came the “Consortium of Consortia” now known as the International Coalition of Library Consortia (ICOLC). It now has over one hundred fifty member consortia from all over the world and its purpose is to use the buying power of the members to influence the way vendors price their products.

Major consortia have developed with a statewide emphasis. Notable were Georgia’s GALILEO (Georgia Library Learning Online), VIVA (Virtual Library of Virginia), the Louisiana Library Network, OhioLINK, and TexShare in Texas, all members of the ICOLC. “All of these consortia have one goal in common: pooling their collective financial resources to leverage greater economic control over their marketplaces.” **(Morgan, 1998)** North Carolina became very interested in such a project. Tarheel librarians began examining the workings of the various

statewide consortia. Nearby GALILEO and VIVA were of special interest to the goal of developing a consortium for the people of North Carolina.

GALILEO began in 1994 as a plan for a statewide library. The vision was for shared databases, universal borrowing, and unlimited access for the people of Georgia. Money from state lotteries was earmarked for education and the Georgia General Assembly approved the project in February 1995 at a cost of \$10,000,000 in startup funding. GALILEO was officially launched September 21, 1995. It originated with the 34 institutions of the University System of Georgia. **(Potter, 1997)** By 1997-1998 it had grown adding 370 public libraries which include 56 regional public libraries, 36 private academic libraries, the 33 vocational-technical institutes, and nearly 1,855 school libraries in the state. In July 1998 some 50 private school libraries were invited to join.

The project offered access to participating institutions to over one hundred databases indexing thousands of periodicals and scholarly journals. At that time over two thousand journal titles had full text along with other resources such as an encyclopedia, business directories, and government publications. Using OCLC's software and services, it had been able to form a seamless appearance totally accessible through the World Wide Web. It also provided links to the Georgia administrative databases and a Georgia union Catalog. The catalog department at Georgia Tech cataloged the resources for useful bibliographic access to the Internet resources. GALILEO's database update announcements make monitoring the additions and subtractions quite easy. **(Brown, 1998)** Through usage statistics and surveys, it is obvious that GALILEO has been a

very successful endeavor for the people of Georgia. By 2004 GALILEO had reached its forty-three millionth hit . Still, funding is an important consideration in the planning of all libraries in Georgia. Penson points out,

Librarians must continue to inform funding decision makers that GALILEO was not designed to 'save money' in order to reduce library budgets. Instead GALILEO has added value to existing resources by providing a wide range of information regardless of location or size, thus eliminating information haves and have-nots. **(Penson, 1998)**

In the Commonwealth of Virginia VIVA was developed to provide support to the thirty-nine state-assisted colleges and universities. These include universities, private institutions, community colleges and two-year colleges. Its mission was to provide enhanced access in an equitable, cooperative, and cost-effective manner. Virginia's General Assembly provided the funding for the project in 1994 with start-up costs of a little over \$5,000,000. In a speech to IFLA Kathy Perry, VIVA's Director, explained that their organization is unlike any other consortium in the United State. She feels that this is due to the decentralized nature that reflects the history and culture of Virginia. This tendency is characterized by the significant autonomy held by the higher education institutions, inconsistent infrastructures in the schools, large, strong public institutions and current emphasis on downsizing central government. VIVA did a study to estimate cost savings over the time period of July 1, 1994-March 1, 1999 and found that they had avoided spending over \$27,000,000 during that time. This estimate was based on the list price of resources that the individual institutions would have spent to purchase those maintained by VIVA. "To the user, VIVA is a site on the Internet that provides access to a variety of

databases, including full text, as well as expediting the physical sharing of resources.” **(Potter, 1997)**

In August 1996 representatives from the North Carolina public libraries, public academic libraries, and community colleges met. They were shown Georgia’s GALILEO and Virginia’s VIVA. The outcome of that meeting was wholehearted support for the concept of developing a virtual library for North Carolina.

To facilitate discussions a Steering Committee of nine members was formed. These nine consisted of one leadership and one library director from each of the four communities of interest as well as a representative appointed by the Governor. The State Library would serve as convener for this group that adopted “Working Together for Excellence: A Vision for North Carolina LIVE” as their vision for the project. A temporary Librarian’s Working Group was formed consisting of members of the Steering Committee. This group would act as an executive committee to prepare recommendations for the Steering Committee. Advisory groups would be formed to develop plans for implementation and would consist of members from each of the communities of interest (COI). **(Working Together for Excellence, 1996)**

The vision was that all North Carolinians would have equal access to electronic information resources and to all the resources in the libraries statewide. Each library was to be a gateway to all the resources in the state and to a wealth of electronic information. The leadership determined that certain goals had to be established in order to achieve the vision. First, the resources

must be made available in electronic format. Statewide licensing agreements must be made which will provide full-text access to standard reference works and indexes using the Internet as its medium. Electronic full-text of core academic journals must be made available for undergraduate use through the Internet as well as research journals to assist in advanced projects. Second, they had to expand their resource sharing between all libraries in the state and find a way to convert all card catalogs to a computer format so data could be shared online. A digital library was to be created to store valuable records and documents. A third goal was to provide the technical infrastructure to facilitate the project. Two parallel server sites would operate to provide a seamless interface during heavy volume traffic on the network. It was decided that each community of interest in the project would provide its own hardware while working cooperatively to develop the access needed. A fourth goal was to add the State Library's State Documents Clearinghouse to the project thereby giving access to state government information. Last, a system of on-going training would be developed to educate the library staffs statewide to be able to assist the users in the access to the resources of the North Carolina Virtual Library. **(Working Together for Excellence, 1996)**

Many discussions ensued between North Carolina and the always-helpful people at GALILEO. William Gray Potter at GALILEO gave valuable insight to the discussion of organization and administration of a consortium. Topics dealt with database selection and licensing, patron authentications, search engines, license negotiations, server sites, and a host of other issues in planning and

implementation. A Resource Advisory Committee (RAC) was formed and a retreat planned for the committee to begin the resource selection process. Also a negotiating team was formed in preparation for decision-making as to which databases were under consideration. **(NC LIVE Steering Committee, 6/2/97)**

In July 1997 a NC LIVE retreat was held in Chapel Hill. The participants included representatives from each of the communities of interest (public libraries, community colleges, public universities, and private academic institutions). Bill Potter (University of Georgia- GALILEO) and Carol Pfeiffer (University of Virginia- VIVA) were invited as resource people. The retreat's mission was to educate the participants on the issues in selecting and licensing electronic resources while establishing a plan of action for proceeding with the project. It was imperative that a team should evolve with a shared vision and a commitment to the success of NC LIVE. Out of this meeting a focus emerged regarding the electronic resources that would be reviewed. The priority would be for indexing, abstracting, and full-text periodicals, followed by access to an aggregator of databases, an electronic encyclopedia, and any other reference works as funding would permit. **(Scott, 1997)** By consensus the group agreed that NC LIVE would make the resources available through all of the participating libraries and that the public libraries would be responsible for providing access to the general public. **(NC LIVE Chronology, 1997)**

Funding of the project was an important consideration. As Sandra Cooper, then State Librarian of North Carolina, had said, "State funding of the project will 'level the playing field' so that rural isolation, community or institutional financial

constraints, and limited local library resources are not barriers to accessing information.” **(Jones, 1998)** The three public communities of interest would request budgets from the state legislature while the fourth community, the private institutions, would gather funds through fund raising procedures so that all four would come to the table with equitable amounts. The budget request from the three public entities to the state Legislature for the 1997-1999 Biennium totaled just over \$9,000,000. A memorandum of understanding would be drafted which would designate a fiscal agent for NC LIVE and explain membership, dues, technical support, and governance. It would be signed by each of the communities of interest. **(NC LIVE Steering Committee, 5/5/97)**

In order for the vision to be successful it was decided that library patrons from the mountains to the coast should have equal access to the resources made available. The libraries of the 16 public universities, the 36 independent colleges, the 58 community colleges, as well as the State library and all of the public libraries would form a network of shared information. It was hoped that in the future public school library media centers could be added to the project.

The project continued to gain momentum. Thirteen vendors displayed their wares for the newly created Resource Advisory Committee (RAC). They included 4 full-text producers, 6 database aggregators, and 3 encyclopedia vendors. At the September 30, 1998 meeting, the RAC made its recommendations to the Librarian’s Working Group (LWG). The LWG approved the committee’s selections and the negotiating team began working on the licensing issues.

Terms of the licensing would include a three-year contract with “ramp-up” pricing for the first year. **(NC LIVE Steering Committee, 9/30/97)**

The Technical Advisory Committee (TAC) was created. It worked in tandem with the negotiating committee to make sure that the infrastructure would be compatible with the resources selected. The TAC’s work included the server site architecture, an NCLIVE central identity, minimum connectivity standards, authentication procedures, server site staffing, and data collection. **(NC LIVE Steering Committee, 9/30/97)**

A charge was given for the formation of the next two vital committees: the Training Advisory Committee (TRAC) and the Publicity Advisory Committee (PAC) at the October 6, 1997 meeting of the LWG. The Training Advisory Committee (TRAC) was given the responsibility to prepare a proposal for training library staff which would integrate vendor training with contracted services from Solinet. They were given a budget of \$75,000 from LSTA funds to assist in the undertaking.

The TRAC devised a basic set of competencies to be used as pre-requisites for attending NC LIVE training sessions that included simple desktop computing skills as well as simple Internet navigation skills. Training sessions were planned to cover three areas of need. The first was the “NC LIVE Basics” that included a basic introduction to NC LIVE resources and procedures. It was a one-day, hands-on session to be attended by front line staff answering reference questions or helping library users with their research.

“ NC LIVE Trains the Trainer” would be a two-day program consisting of a one day Basics and a one-day review of effective training techniques. This was designed to be attended by library staff responsible for training other staff to use NC LIVE. The attendees at this workshop would leave with a prepared presentation that they could use to train others. Solinet would present both the “Basics” and “Trains the Trainer.”

Vendor training was part of the negotiation packet. Each vendor chosen would commit to training sessions for library staff using NC LIVE. The contracted sessions would be divided into a series of three 2-day “boot camps” and 2 additional regional vendor-training workshops. The hands-on “boot camps” would bring the vendors to one site for rotating half-day workshops. Each vendor would provide the content for his product’s training. **(NC LIVE Librarians Working Group, 2/10/98)**

The Publicity Advisory Committee (PAC) was formed with the intent of publicizing the NC LIVE project as well as constructing the graphical design. Their first assignment was to develop a series of six regional briefings on NC LIVE which would include background, a description of types of resources available, a demo of the vendor sites, training concerns, technical requirements, and an update on the kickoff. These were held March 23-April 9, 1998. They began to write media announcements and plan for the public unveiling scheduled for National Library Week (April 19-25, 1998). **(Librarians Working Group, 2/10/98)**

Resource negotiations finally ended and an announcement was made to the members of the various committees as well as to the list-servs created for the dissemination of information on the project to librarians' statewide. The Vendors whose products would be used included UMI, Ebsco Host, Silver Platter, and OCLC. **(NC LIVE Update #1, 1998)**

On January 31, 1998, NC LIVE began to offer its services in a limited experimental manner. It was unveiled to library staff as a workable test site. Plans were begun to form a Help Desk to answer library questions of a technical nature. The PAC, with consultants Sally Johns and Michelle Conger, presented the logo, slogan, and suggested color scheme for the look of NC LIVE to the Librarian's Working Group. In March the new face of NC LIVE was displayed on the test site. Discussions were held regarding the kickoff activities. The RAC recommended that the product NoveList be added to NC LIVE. The licensing fees for this product were to be paid by the State Library of North Carolina. The committee also began looking at resources available for one-time purchases. The TAC began working on the problem of authenticating remote access users. **(Librarians Working Group, 3/4/98)**

The next two months were committed to looking for any problems that could occur. An official Ribbon Cutting was planned for April 21, 1998, to coincide with National Library Week. The Publicity Advisory Committee in conjunction with Sally Johns of Sally Johns Designs and Michelle Conger, a graphic designer, planned a major kickoff. A proclamation was issued by Governor James B. Hunt, Jr., and Resource Kits were distributed to all libraries.

The materials included brochures, banners, bookmarks, and stickers. The committee planned a media blitz and was rewarded with television coverage of the event. **(Jarvis, 1998)** Margo Jarvis' article, "Anatomy of a Marketing Campaign," **(Computers in Libraries, Sept. 98)** details how one library system successfully marketed the NC LIVE project to its residents.

NC LIVE was well received by library patrons. Patrons using the databases seem to be pleased with the wealth of knowledge available. Statistics from the project paint a picture of how often the databases are accessed. The graph below indicates that in the first fifteen months of operation close to 18,000,000 requests has been made to the site. This is in sharp contrast to the 3,000,000 that Galileo recorded in its first twenty-four months.

In November 1998 a new committee was added to the project, the Web Advisory committee (WAC). Its duties included making the homepage as user friendly as possible through a series of minor adjustments. The committee also developed pages within the site for the posting of news, training, and technical FAQ's. **(NC LIVE Librarians Working Group, 11/6/98)**

The Technical Advisory Committee addressed the issue of remote access. Quickly, patrons of the four communities of interest were able to access NC LIVE from their homes. The server site staff developed a program that avoided the use of proxy servers. Registered patrons were issued passwords to complete the authentication process.

The NC LIVE project continues. Goals that it set for itself continue to be reached as the effort moves forward. State documents are now accessible to the

public along with many links to valuable resources in the state such as the North Carolina Encyclopedia. These are ambitious undertakings and the success thus far with the NC LIVE project shows just how much can be accomplished in time.

For its success in marketing NC LIVE was chosen as a winner of the American Library Association's **John Cotton Dana Library Public Relations Award** for 1999. This award honors outstanding achievement in library public relations and was presented at the American Library Association Annual Conference in New Orleans. The award noted the outstanding spirit of collaboration exhibited by the state's libraries. **(American Library Association, 99)** This spirit will continue as the NC LIVE project grows and reaches more of the citizens of North Carolina.

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