

**State of Wisconsin/Department of Transportation**  
RESEARCH PROGRESS REPORT FOR THE QUARTER ENDING: March 31, 2006

Program: TPF-5(105)	FHWA Pooled Fund Research Program
<b>Project Title:</b> Administrative/Marketing Services <b>Administrative Contact:</b> Christi Powers <b>WisDOT Technical Contact:</b> Ann Pahnke/John Glaze <b>Project Investigator (agency &amp; contact):</b> Christi Powers, Administrative & Marketing Coordinator	<b>Project ID:</b> 0092-06-30 <b>Sponsor:</b> Transportation Library Connectivity Pooled Fund <b>Approved Starting Date:</b> 10-01-05 <b>Approved Ending Date:</b> 09-30-07

**Percent Complete:**

This report spans the fiscal federal quarter from January 1 to March 31, 2006. Solicitation for the project began in October, 2004 and some 10 states have joined the study with Wisconsin being the lead state. The project runs through September 30, 2007 (8 fiscal quarters) and is approximately 25 percent complete

**Project Description:**

The Transportation Library Connectivity pooled fund study focuses on making the transfer of information an integral part of transportation library and information services. The Administrative and Marketing Services contract supports a part-time consultant to oversee the project and develop marketing tools and outreach strategies that promote the value of libraries and information services.

**Progress This Quarter:**

The work performed by the administrative and marketing consultant included:

1. Web site launched. In conjunction with the University of Wisconsin-Madison's Department of Information Technology, the pooled fund study Web site was launched in January, 2006 – [www.libraryconnectivity.org](http://www.libraryconnectivity.org).
2. Scheduled and conducted two teleconferences. (Note: Due to a telecommunication glitch, the February 2, 2006 teleconference was rescheduled to February 15, 2006. An additional teleconference was scheduled on March 2, 2006 to discuss Online Computer Library Catalog rates).
3. Assisted technical consultant on OCLC subscription status. Several teleconferences and worksheets were reviewed and discussed to agree on a recommendation as to OCLC reimbursement of subscription costs. Further, those results/options were discussed in a specially-scheduled teleconference on March 2, 2008 with participating Technical Advisory Committee (TAC) members.
4. Recorded and posted teleconference minutes. Also participated in affiliate conference calls such as the Midwest Transportation Knowledge Network (February 9, 2006) and the TRB Policy Study Implementation committee teleconference (March 29, 2006).
5. Designed, proofed, printed and mailed a marketing toolkit for National Library Week, April, 2 to 8, 2006. Now available on the Web site, this toolkit included a:
  - Customized brochure
  - Customized flyer
  - Set of Bookmarks
  - Set of Thank You notes
  - National Transportation Knowledge Network (NTKN) brochure

Wisconsin, Ohio, Kansas, Oregon and Washington participated in the National Library Week event. A total of 2,000 bookmarks were distributed, 335 customized flyers and brochures, 400 thank you notes and more than 650 NTKN brochures.

6. Researched performance measures for the study. Upon approval by the TAC, these measures will help determine the value of promotional and outreach activities and correlate with technical service measures. Current outputs underway include:
  - Number of hits to Web site per month
  - Results from Open House survey to be distributed during Library Week
  - Number of print materials produced and distributed during federal fiscal year
7. Met with and briefed new WisDOT chair representative. On March 8, 2006, the Administrative/Marketing consultant traveled to Madison, Wisconsin to update a new representative from the lead agency, the Wisconsin Department of Transportation (WisDOT) on pooled fund study progress.
8. Performed overview of TPF contributions. The Administrative/Marketing consultant is also working with this representative to monitor and track FHWA entries by on the Federal Management Information System (FMIS). This is to monitor existing and outstanding commitments and encumbrances via the TPF Web site.
9. Drafted and updated Memorandum of Understanding. A new MOU was prepared and will be reviewed and distributed. Once finalized in May 2006, TAC members will receive a copy to sign and return to WisDOT.

#### **Work Next Quarter:**

10. Finalize and produce insert for NTKN brochure that will become part of the marketing toolkit. This piece will be especially designed to target upper management DOT practitioners or potential states interested in joining the pooled fund study.
11. Continue updating the pooled fund study Web site.
12. Schedule, coordinate and take minutes for at least one quarterly teleconference in June or July, 2006.
13. Compile budget update of Web, print and other marketing –related costs.
14. Finalize arrangements for TAC annual meeting which will be held September 19 to 21, 2006 in St. Paul, Minnesota.
15. In conjunction with the library technical consultant, finish researching, drafting, developing and producing an NTKN brochure insert for distribution to the management/CEO target audience. Purpose will be to report pooled fund study progress and continue promoting the value of information and library services within state departments of transportation.
16. Finalize, approve and post on Web site a list of performance measures for the study (with TAC approval).
17. Complete and post on Web site a menu of marketing ideas for TAC states to implement in outreach activities throughout the remainder of the calendar year.

**Circumstances Affecting Progress/Budget:**

No anticipated delays. Web development cost was well under estimate as with print materials for marketing toolkit. Workflow and marketing deliverable estimated below:

<b>April, 2006</b>	<ul style="list-style-type: none"><li>• NATIONAL LIBRARY WEEK. "FIND IT @ YOUR DOT LIBRARY" (WI, OHIO, WA, KS, OR PARTICIPATING)</li><li>• QUARTERLY TELECONFERENCE</li><li>• QUARTERLY REPORT GENERATED</li><li>• LIBRARY WEEK RESULTS COMPILED AND POSTED ON WEB SITE</li></ul>
<b>MAY, 2006</b>	<ul style="list-style-type: none"><li>• Marketing/outreach performance measures identified, reviewed and approved by TAC</li><li>• September annual meeting arrangements discussed and approved</li><li>• Template of marketing ideas compiled, distributed and posted on Web</li><li>• NTKN brochure insert completed and distributed</li></ul>
<b>JUNE, 2006</b>	<ul style="list-style-type: none"><li>• September annual meeting arrangements finalized</li><li>• Pooled fund study budget update distributed</li></ul>
<b>JULY, 2006</b>	<ul style="list-style-type: none"><li>• Quarterly teleconference</li><li>• Strategies for second-year outreach initiatives discussed and approved</li></ul>

2. Survey: Web based survey development & data collection
3. Survey data synthesis: Develop site specific profiles from survey results
4. OCLC profiles: Gather specifications on cataloging systems & OCLC status for OCLC memberships & contracts
5. Initiate OCLC membership process: contact OCLC sales regarding group membership (unlimited WorldCat, FirstSearch, TLCat)
6. Site visits: January – March 2006
7. Subscription evaluations: examine value of existing subscriptions; look into group subscriptions and cost saving alternatives
8. Collection evaluations: identify strengths and gaps in physical and electronic collections
9. OCLC subscription negotiations: work on agreeable contract with OCLC for group membership fees (unlimited WorldCat, FirstSearch, TLCat)
10. Finalize OCLC memberships: sign contracts, set up new accounts, and arrange training
11. TLCat / TRIS integration: investigate coordinating TLCat & TRIS databases
12. Survey report: Continue developing site profiles and comprehensive report of survey results, post to website
13. Draft Phase 1 report will be submitted to the TAC by March 31, 2006

**Progress this Quarter:**

Ten of eleven pooled fund libraries have been active in Phase 1 activities this quarter. Louisiana DOT has been inactive since hurricane Katrina. Completed tasks are assumed to involve the ten active member states, and follow-up work with Louisiana will occur when they rejoin the pooled fund study.

Our accomplishments this quarter include completion of an online survey, significant progress in the development of library for each of our members, site visits to nine of our eleven libraries, full reports on each visit, and thorough investigation and implementation of OCLC subscription services for all of our participants. The draft Phase 1 report was submitted to the TAC by the March 31, 2006 deadline. The participation and input of the Technical Advisory Committee has been instrumental in completing these tasks.

Subscription services from the Online Computer Library Center (OCLC), which include participation in the WorldCat database and the TLCat subset catalog, as well as a combination of other fees, have emerged as a leading issue this quarter. We secured these subscriptions according to participants' reported needs, and were able to distribute the funds designated for OCLC services so that each participating library received some benefit from the pooled fund. Pre-existing arrangements of our libraries with OCLC, the disparity in the level of prior involvement with OCLC, and the fact that OCLC tailors subscription costs to individual libraries based on factors such as historic level of cataloging and resource sharing activity, make coordination of these services to groups a very involved process. Despite the complex nature of the services, we have been able to sign contracts for new and existing subscriptions that put all of our participants on very nearly equal footing with OCLC. We coordinated our efforts with OCLC and the regional service providers for over three months to sort out the details of the subscriptions and costs. Negotiating the subscription costs resulted in our group securing the same group rate that the National Transportation Library-subsidized libraries have enjoyed. Wisconsin Library Services (WiLS) is acting as our agent with OCLC and we are coordinating invoicing through them. Our relationship with WiLS has streamlined the contract and invoicing process and we look forward to continued benefit from working with them. This was by far the most complex and time-consuming task.

**Circumstances Affecting Progress/Budget:**

The following items have not been addressed this quarter as anticipated due to the evolving nature of the project:

A comprehensive survey report is in development and will be presented to the TAC prior to the April 19<sup>th</sup> teleconference. Delays in members completing the survey and other report deadlines have pushed this report back slightly.

Subscriptions have emerged as needing in-depth evaluation, which will likely conclude next quarter. Addressing this task was not practical earlier in Phase 1 due to the demanding travel schedule for the site visits, limited time available at each library and the time-consuming nature of investigating and securing OCLC subscriptions services. Subscription database information has been gathered with the survey, and more detailed vendor and license information will be gathered next quarter.

Collection assessment will be addressed next quarter and will include investigation of software to accomplish the assessments effectively and precisely. We will also consider the possibility of having a pooled fund subset of TLCat, which would require the approval of Nelda Bravo at NTL (TLCat administrator). This could prove useful in evaluating the member libraries' collections.

Investigation of integrating TRIS and TLCat for better functionality has taken a back seat to the OCLC subscriptions this quarter. Not all member libraries had subscriptions to TLCat during this quarter, and new subscriptions are in process. Investigating coordination of the TLCat database with TRIS will begin next quarter. Coordination of the two databases would offer a tremendous benefit to librarians, researchers and practitioners; however it should be noted that the owners of the two products, TLCat (OCLC) and TRIS (TRB & BTS) have control over their databases. Investigating the coordination of the two bibliographic databases may or may not result in any actual moves to integrate or coordinate them in any way.

Two site visits are yet to be completed. Montana DOT has been in the process of hiring a new librarian and has requested that their visit take place when the librarian is in place. Louisiana DOT has indicated that they may be ready for a visit in the fall of 2006.

Our work is largely on schedule at this stage of the pooled fund study, with the exceptions noted above. As the project goals and priorities evolve, the tasks to address them have evolved as well. No delays are expected beyond those that may occur when working with a large group (scheduling issues with librarians and research managers, accommodation of participants' responsibilities to their libraries and agencies as priorities, etc.).

All Phase 1 tasks and activities are currently within budget for this quarter. OCLC subscriptions were budgeted at \$21,214.00 and came in under budget at \$20,640.94. This figure includes costs for Louisiana, which has yet to opt in to OCLC subscriptions for 2006. The technical services librarian's travel budget was set at \$15,000.00 and \$4,438.70 in travel expenses have been incurred to date.

**Work Next Quarter:**

**Continue Phase 1 Tasks:**

- Site visits: Montana and possibly Louisiana
- Conclude survey with comprehensive report and site profile reports
- Collection evaluations: Identify strengths and gaps in physical and electronic collections, gather detailed information regarding subscriptions and databases, contact vendors to reduce subscription costs and expand access with group rates, investigate collection evaluation tools
- Subscription evaluations: Examine value of existing subscriptions, seek recommendations from TAC for desired online tools, look into group subscriptions and cost saving alternatives
- Investigate pooled fund subset of TLCat: Discuss the benefits of a pooled fund view of TLCat with TAC, contact OCLC and TLCat administrator Nelda Bravo to implement
- Investigate coordinating TLCat & TRIS databases: Contact owners/administrators of the two products, TLCat (OCLC / NTL) and TRIS (TRB & BTS,) to get feedback and discuss with TAC

**Gantt chart:**

The Transportation Library Connectivity pooled fund study is broadly outlined in two phases. This table reflects Phase 1 tasks.

Task Description	2005			2006				% Complete
	Oct-Dec Q4	Jan-Mar Q1	Apr-Jun Q2	Jul-Sep Q3	Oct-Dec Q4			
1 Subscriptions	■	■	■				60%	
2 Survey		■	■				100%	
3 Survey data synthesis		■	■	■			75%	
4 OCLC profiles		■	■				100%	
5 Initiate OCLC membership process		■	■				100%	
6 Site visits		■	■	■			82%	
7 Subscription evaluations		■	■	■			20%	
8 Collection evaluations		■	■	■			20%	
9 OCLC subscription negotiations		■	■	■			100%	
10 Finalize OCLC memberships		■	■	■			100%	
11 TLCat / TRIS integration			■	■	■		0%	
12. Survey report		■	■	■			80%	
13 Draft Phase 1 report			■				100%	
Proposed	■							
Actual	■							