

# Independent School Library Exchange

*This twelve-school project has improved twelve school libraries and demonstrated what can be gained through cooperation.*

Ellen Mintz with Lynn Angell

This is the story of how several school librarians banded together to meet the Hydra of advanced technology. While we cannot claim to have completely domesticated the creature, we are no longer overwhelmed. In fact, we feel quite victorious.

Twelve schools in southern California—Brentwood School, Campbell Hall, Cate School, Crespi Carmelite High School, Harvard School, Marlborough School, Marymount High School, Mayfield Senior School, Thacher School, The Webb Schools, Westlake School, and Woodward School—have undertaken a joint venture: becoming members of OCLC, the world's largest library database, with funding from the W. M. Keck Foundation. To understand how this all came about, we must take you back to the beginning.

In Los Angeles in 1981, a group of school librarians joined together in a network to provide support for professional activities and to share

the more personal challenges that arise in our daily work. The Independent School Library Exchange, ISLE, began with eight members, grew to fourteen, and now twenty schools in southern California share magazines. The group began with a union (combined) list of 141 magazine titles and now has 451. The network provides a quick, simple, low-cost service to these member schools. Each school pays \$25 a year and agrees to list its periodical holdings and to respond to telephone requests within twenty-four hours. The group began with a simple goal because it answered a clear need in all the schools, required little negotiation, and cost nothing. The only expenditure in the first years was time—time that had previously been spent trying to locate materials for our patrons from other, less responsive agencies.

It is important to recognize how uncomplicated our group was in the beginning. With the well-defined goal of improving students' access to magazines listed in *The Readers'*

*Guide to Periodical Literature*, progress would be easy to measure and, we hoped, success easy to attain. During the first school year, 1981-82, eighty-four requests were filled. Two years later, 299 requests were filled, and last year this number climbed to 642.

Our members began to speak at meetings and found many other librarians anxious to learn how ISLE had set up its network. Success encouraged the ISLE librarians to think about other activities. It became evident that certain schools had subject strengths the group could benefit from, and we began to share limited reference services.

## ISLE and computers

As a group, the ISLE librarians enjoy the wide range of activities that each school day brings, dealing with the mundane and the esoteric with relish. We select materials, generate orders, administer budgets, handle technical processing, train and supervise staff and volun-

teers, field requests for information, teach library skills, and participate in both the curricular and extracurricular life of the school.

Over the years, one issue that dogged all of us in our work was the advent of computer technology. ISLE members shared their collective curiosity about and anxiety over its meaning for school libraries. Most of us were reluctant to bring computers into the library, even though they promised to simplify the tedious aspects of work and free our staffs to spend more time on the stimulating questions. Simply put, many of us were intimidated by this technology.

We talked about automation at ISLE meetings. When one of the group made a foray into the high-tech world, the rest waited eagerly to see how it went. We began to learn about word processing, data management, and small library task-management programs. Several of the group learned to use DIALOG and were excited to discover what database searching could mean in small libraries, where patrons' requests frequently stretched the resources at hand.

For several reasons in the spring of 1985, ISLE was at the point of considering a large-scale automation project: several of the schools were ready to embark on a project that would serve as a building block in an integrated library system; the group had a successful history of working together, both as institutions and as individuals; and we had an introduction to a large private foundation that had an interest in supporting projects in precollegiate education.

The Harvard School library had first faced the automation issue in 1982. Christopher Berrisford, the head of the school, had early advocated the use of computers in many areas of the school. Business office, scheduling, and secretarial procedures had all been converted to various systems, and the general level of computer literacy was quite high. In 1982, Mr. Berrisford suggested

that I look into ways of using computers in the library. I was unprepared for this challenge. Primarily I was a reference librarian, and many of the other aspects of running a library were of secondary concern to me. I accepted these tasks as necessary for an effective library, but I did not love cataloging and the more systematic side of librarianship, and I feared that automation would require spending days and weeks dealing with the exacting process of getting books on the shelf. The existing systems we used were rudimentary but adequate, and I understood them.

Fortunately, our director of computer services, Richard Humphrey, helped me learn about automation. He introduced me to William Spivey, a consultant who had worked with public and academic libraries. Both men guided me through the maze of jargon, urging me to think about what would best serve the Harvard School library. I had taken a course on computers and libraries through the University of California Extension and had been thoroughly dismayed because it was a programming course. Was I going to have to spend my time telling a computer to "put" and "get" and writing "do-loops"? This was *not* why I had become a librarian.

Dick Humphrey understood this. He taught me that technology is a tool to make what we do in the library easier and more efficient; if it caused us to curtail our public services by requiring us to spend less time working with the students, then it was not the right system for us. As a computer novice I was comforted by this statement: "What you do as a librarian is too valuable to be compromised by the demands of an automated system."

### **The mysterious acronym**

During this period of learning and investigation, I visited libraries with automated systems, talked to vendors, and read articles. On one visit, I went to the Honnold Library, at the Claremont Colleges, and to the OCLC (Online Computer Li-

brary Center) Pacific Network office, also in Claremont, California.

Up to that time, OCLC had been a mysterious acronym for big, expensive, sophisticated library computer "stuff," nothing a school librarian need concern herself with. The staff at Honnold Library and at OCLC dispelled this misconception immediately. Yes, OCLC was big, expensive, and sophisticated, but it was also possible to use the service on a cost per item basis. And OCLC's offerings were complete, all the components of a fully automated library were available, and a librarian need select only those subsystems that were suited to a given library's size, sophistication, and budget.

OCLC, an international not-for-profit vendor of services based in Dublin, Ohio, is a leader in research and development in library technology. Whatever might develop in library automation will likely come from OCLC or be compatible with its technology and products. The company's services, access to its database, and products—software, catalog cards, and MARC (machine-readable cataloging) records—are marketed primarily through regional library networks, such as SOLINET (Southeastern Library Information Network), ILLINET, and AMIGOS (see "Glossary"). These networks are largely composed of state, county, city, and university library systems and some special collections. Schools, singly or in districts, have seldom played a large role in these networks. Their limited participation, it should be noted, is due as much to budgetary constraints as to timidity.

On the West Coast, the network structure is different; OCLC (Ohio) owns the Pacific Network, with all marketing and training and most member support emanating from one source. OCLC, eager for school members, willingly applied its resources toward bringing Harvard School, and later the ISLE members, into the system.

This flexibility and the genuinely involved OCLC staff convinced me

that OCLC was a plausible option for Harvard School. When I look back on my written proposal to the head of the school, I am embarrassed by how little I knew about the system we were buying; but I think I did understand the part it would play in automating our library and connecting us to the broader world of information.

Harvard School library joined OCLC in the spring of 1982, and we have never regretted it. Certainly it has been more expensive than ordering Library of Congress catalog card sets and having parent volunteers type in our editing, but the quality of our cataloging and the improved access our students now have to our library's holdings and those throughout the country more than justify the cost. It was a gamble that paid off with improved user services, efficiency, and moving us toward automation.

### Opening the GAP

At ISLE's 1985 spring meeting, we considered several possible library computer packages: an online database searching package; offering ISLE as a test group for custom-built library management software; and a group access project (GAP) with OCLC. We rejected database searching because it provided no lasting product for schools and libraries; participation in an untried software system seemed too risky. The OCLC project seemed best, for OCLC was a known quantity, and Harvard School's experience was proof that it could be useful in secondary schools.

The deciding factor was that this project—to be known as ISLE/GAP—would provide the enduring benefits of building a machine-readable tape record for future use in developing fully automated libraries. Each library would be incorporating high-level, standardized cataloging procedures into its operation. Finally, the OCLC group access project seemed to be the most readily fundable one. We based our initial planning on the participation

of four to six schools for one year. We thought the project would cost about \$65,000.

We had the name of a large foundation that had funded several projects in independent schools in southern California, the W. M. Keck Foundation. During a visit to one of the ISLE schools, the foundation's representative had expressed some interest in its library's collaborative activities with other schools. We got in touch with the foundation and made an appointment with the program officer for education, Sandra Glass, to discuss a possible proposal. To this meeting we brought a brief outline of the ISLE/GAP project. Dr. Glass urged us to think

very specifically about how such a project would work and to examine all the possible costs and benefits in detail. She also suggested that any proposed project be made available to as many ISLE schools as might wish to participate.

Heartened by Dr. Glass's advice, we asked the head of Campbell Hall, Thomas Clarke, for further guidance. He also encouraged us to offer the project to the entire ISLE membership and volunteered to sponsor a planning meeting for the heads and librarians of all the ISLE schools. Invitations went out to the fourteen schools for a meeting at Campbell Hall on May 7, 1985.

Harvard School's three years with

## Glossary

**Automated libraries.** Libraries in which (a) their various activities have been converted from manual operations to those using computer technology (for example, overdue notices are no longer handwritten but are generated by a software program and require less time to produce), and/or (b) their resources are greatly expanded by ready access to information through online databases.

**Database.** Files, lists, a collection of information stored in a format that can be searched and read using a computer. In a library context, this can be a list of books and where they are located or an index to a body of literature.

**Database searching.** The process of searching through a machine-readable database using the prescribed protocols (commands), language, and strategies designed to elicit the desired information in the most efficient manner.

**DIALOG.** A vendor, or clearinghouse, for over 225 public and private databases. For a fee, one searches these databases through DIALOG. DIALOG provides training, documentation, and continuing support for its customers; it also works with the information provider (those who own or contribute to the database) to ensure that en-

hancements are consistently implemented and that users are kept apprised of all changes.

**MARC record.** The Machine Readable Cataloging format is the accepted standard for bibliographic records converted for use in automated library systems; developed jointly by the Library of Congress and the British Library.

**OCLC.** Online Library Computer Center, Inc., began as a joint venture of fifty-four college libraries in Ohio in 1967. Incorporated as a not-for-profit corporation in 1977, OCLC has over 5,000 institutional members, all of whom add their collections to the database, which now claims over 14 million items. Members may, through online connection with the computers in Ohio, search the database for cataloging records for use when adding new titles to their collections or to locate titles for interlibrary loan. The members' contributions are supplemented by the periodic inclusion of MARC records of recently cataloged titles from the Library of Congress, National Library of Medicine, and the British Library.

**Regional networks.** AMIGOS (Bibliographic Council, Inc., serving Texas and the Southwest), ILLINET (Illinois Library Network), and SOLINET (Southeastern Library Network, Inc.) are examples of regional library networks that, among other services, provide access to OCLC to their members.

OCLC had helped the other ISLE librarians become more conversant with OCLC, but they knew that one of the most important hurdles to be faced was explaining what we wanted to the school heads. We needed a way to convey the importance of automated cataloging and the significance of ISLE/GAP for schools without dwelling on the "housekeeping" aspects of the project. For this we turned to Patrick Barkey, director of the Claremont Colleges libraries and of OCLC's Pacific Network. He spoke to the assembled heads about the value of such a project, explaining what automation had meant to larger institutions and describing its utility for students and faculty members.

At this meeting, Mr. Clarke talked about the structure of a joint proposal. He assured everyone that this application would not compromise proposals from individual institutions and that every care would be taken to ensure that each school had an equal share of the project. By this time, ISLE hoped that it would be possible for the group to hire a single staff person to coordinate the project.

Fourteen schools had been invited to this meeting, thirteen attended, and within a week twelve schools said they would participate in ISLE/GAP. With this unexpected response, ISLE needed to consider how best to handle twelve members. We decided that a two-stage project was best and that the schools most ready for the undertaking would join the first year, giving the second group more time to prepare. This plan would also provide a "shakedown cruise" for the project. The participants divided themselves into two groups: Campbell Hall, Cate, Harvard, Marymount, Thacher, Webb, and Westlake to begin the first year, and Brentwood, Crespi, Marlborough, Mayfield, and Windward to join the second year. From the beginning, ISLE/GAP had the assistance of DiAnn Iverson, a senior coordinator with OCLC Pacific Network. She knew what was techno-

logically feasible and could recommend a reasonable approach for our small libraries.

### The proposal

During the next three months, the librarians worked on the proposal. Although we had never written one, we were determined to be as thorough as possible. From March through May, we identified three issues that required unanimous agreement: first, that each school would be a full but separate member of OCLC; second, that each school would contribute money (\$5,000) to the project and would make "in kind" contributions as needed; and third, that a cataloging coordinator would be hired to help the schools learn the system and provide support throughout the project.

With these issues settled, the two of us wrote a document that gave ISLE's history and activities, a description of the ISLE/GAP project, a detailed budget, sources of funding, the procedures to be followed in carrying out the project, job descriptions for the project directors and cataloging coordinator, methods for reporting and evaluation, and supporting documents on each school and its library program.

The final proposal was very explicit so that everyone in the project would know what was expected of them and what they could expect from the project. All subsequent reports, correspondence, and other communications concerning the project were quite detailed as well—important for a project that had so many participants.

As the project grew in scope, so did its proposed budget. We aimed to keep the amount requested close to \$150,000. To do this, we determined the value of all the components of the project—equipment, staff, connect time and products, and training and support services. We made a list of budget items that could be contributed by the participants—office space and equipment, training facilities, staff time. One

such was the use of Campbell Hall's business office to handle grant funds and expenses for ISLE/GAP, which is not a legal entity incorporated with the not-for-profit status needed to receive foundation money. Campbell Hall serves as the legal agent for the group, receiving and disbursing all money.

Each school agreed to permit its librarian to commit 20 per cent of her time to the project. For most, this was time already spent on cataloging, although for several schools it meant hiring additional support staff to free the librarian to concentrate on ISLE/GAP. In so doing, schools recognized that, initially, this new process would make some new demands on the staff. Each librarian would require several days away from the library for training in addition to quiet, uninterrupted time to practice and become familiar with OCLC. This agreement also indicated to heads of schools that the project would bring their libraries to a new level of complexity and that certain informal staffing arrangements might need to be clarified.

We added the salary of a cataloging coordinator to the shopping list of OCLC equipment and training and production costs. ISLE/GAP needed someone with the background and energy to help achieve the project's greatest potential, a professional librarian with experience in automated systems and an affinity for school work. In setting this salary, we surveyed the participating schools and determined that the cataloging coordinator's salary should be comparable to that of an assistant librarian with full professional responsibilities. In this way, the ISLE/GAP cataloging coordinator would be an equal partner with all the ISLE librarians.

We submitted the proposal in July 1985. In September, we were invited with Campbell Hall's head to visit the Keck Foundation's offices to ask, and answer, any questions concerning the project. The meeting was cordial, but, having no previous experience to call upon, we

had no sense of what the ultimate decision would be. ISLE received the good news on December 20, a most welcome Christmas present.

### Getting under way

On January 15, 1986, the eager and now funded group met at Harvard School to inaugurate the ISLE/GAP. DiAnn Iverson brought all the forms and documents necessary for new members joining OCLC. The first step in joining OCLC was profiling—making a detailed analysis of a library's cataloging requirements. This process gave each school the opportunity to look critically at its library's operations and to alter them in a way that would be compatible with present and future practices.

The profiling process took several weeks, during which time other phases of the project moved ahead. We began our search for a cataloging coordinator. ISLE/GAP was eager to find an enthusiastic partner, but cautious about overselling "life in California" to candidates from other parts of the country. The position required someone flexible enough to work successfully with as many as three dozen library staffers and willing to travel widely and frequently on the freeways of southern California. After interviewing several candidates, we selected Selma Jaskowski, of Ann Arbor, Michigan, a professional librarian with teaching experience and an academic background in automated library systems.

Equipment ordered in January for the first seven schools began to arrive during the spring. Each library received an M300 Workstation (an OCLC-modified IBM PC), an Epson FX 85 printer, a Hayes 1200 Smartmodem, and the necessary cables and software for using both the cataloging and interlibrary loan subsystems of the project. Each library also received a "search only" set of equipment, to be used by students and faculty members; most schools chose Apple computers with modems and communications software for this purpose.

Both the M300 and the Apple can be used for other library and office functions—an important feature, because each library also uses word processing and data management programs in its daily work.

Selma Jaskowski joined the project after spring break and began to visit the schools right away. A service firm had been contracted to install equipment, but, with Selma's help, software was configured, copied, and generally sorted out. Each librarian needed a brief introduction to OCLC Basics, a self-paced program that serves as the first step in the training process. Selma's visits introduced her to the member schools and assured the librarians that they would have an enthusiastic and thoughtful guide through each step of the project.

The formal training session with the OCLC staff was scheduled for the end of April, just one year after the very beginning of the proposal. This workshop was held at Westlake School, the site of ISLE/GAP's office and the project's home base. The library staffs of the first seven schools settled down to learn the intricacies of OCLC. DiAnn Iverson and Selma Jaskowski worked together to introduce each aspect of searching, editing, and producing cards, using the cataloging subsystem.

The two training days were scheduled one week apart to give time for practice with each new skill. The sessions were long and filled with a great deal of new information. By being able to work with others, each of us found it much easier to learn new techniques than we had thought.

After the training sessions, Selma continued her frequent visits to schools to answer questions, allay fears, fine tune the equipment, and encourage each of us. As the school year ended, we were at home with the system and using it productively.

What we had been learning is called "copy cataloging"—using an existing bibliographic record in the database as it stands or modifying

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it to suit the individual library. We attended a workshop in August to learn "original cataloging," creating a bibliographic record for a title not found in the database, which requires more confidence and experience, if not more skill. At this same workshop, held at the OCLC offices in Claremont, we reviewed basic strategies and learned to use the interlibrary loan subsystem in time for the opening of school in September.

#### Advantages of group access

A group access project of this type has many advantages and few of the limitations of other joint ventures. Each participating school has a full, independent membership in OCLC, ownership of all equipment and products of the project (the one exception being the MARC tape record, at a cost of \$1,000 a year, which is shared by each member paying one twelfth of the total), and the freedom to use the system in any way the institution desires after completion of the two years funded by the grant.

Many groups require that members continue participation to retain the right to use the products, in effect "leasing" the service, without owning any of the products. Others require that a group agree to use the same cataloging specifications

(call numbers, subject headings, etc.), thus relinquishing the kind of local control that reflects and responds to the specific needs of each library's users. For example, some schools have a "biography" section in their library, whereas others put individuals in their fields of endeavor—Einstein in physics, Franklin Delano Roosevelt in American history.

Finally, the greatest advantage is financial. As a group, we were able to put together a "package" that included a shared staff person perfectly suited to the activity. Had each school tried to go it alone, it is doubtful that each would have found an appropriate support person and even less likely that each could have afforded to hire one. Without the cataloging coordinator, our success would certainly have been much more slowly realized and the benefits to our users largely deferred.

ISLE's other members do not as yet have access to the online information available to those participating in ISLE/GAP. However, OCLC does have a provision for selective users in participating networks like ISLE. At some time these schools may elect to become selective users of OCLC with access to the holdings of the group. This could be an alternative to either expanding and ex-

tending this project with another proposal or developing our own separate online database. This selective user option is also available to other independent schools throughout the country. Automation makes it possible to share our information without regard for geography.

#### Benefits

In addition to the tangible rewards of money, equipment, access, and efficiency that have come from ISLE/GAP, we have made several important psychological gains.

This group of librarians initiated a program that not only made their schools' libraries better but showed everyone what can be gained by cooperation. Many school heads have remarked that they wish other professional groups would find ways to cooperate materially, for they believe that collaboration can strengthen individual programs in each school.

And we have enjoyed the renewed perception of the library, and librarians, as an innovative force in schools. In conquering our own computer anxiety, we have helped to make the tools of automation—and scholarship—available and accessible to everyone in the school. ISLE/GAP is living proof that libraries and librarians are an active, dynamic part of the school. It is too easy to think that doing our job well and quietly is enough. We need to use the current vocabulary to remain a visible force; it appears that today's language is automation.

The schools of ISLE are happy and eager to share what we have learned. We believe that what we have done can help others meet similar challenges. As we develop machine-readable files of our libraries' collections, we can be linked, as collegial institutions, across town, across the state, and across the continent. □

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