

Growing PINES in Georgia

By Steve W. Schaefer

HOW A MIGHTY
MODEL OF
PUBLIC LIBRARY
COOPERATION
FROM A TINY
ACORN GREW

Public librarians can be such profound hypocrites. We may talk the talk but often do not walk the walk. We evangelically spread the gospel of “information to the people,” but when some of those information-seekers confess that they live outside the “recognized” legal service area—and want to borrow library materials—we demand a tariff. In other words, the nonresident public is welcome to take a peek, but cannot take anything home.

We justify this discriminatory policy by adhering to the tradition

that the primary source for financial support defines the constituency. On the other hand, we gladly take federal and (sometimes) state funds and use them to provide public library service. For those federal and state taxpayers, however, access is restricted. For them there is no *quid pro quo*. Yet public librarians can sleep at night, by proclaiming: “Let them use interlibrary loan.”

The acorn is planted

A few years ago, a nonlibrarian—a state bureaucrat, actually—asked several library system administrators why every Georgian could not use the very same library card at each and every public

library in the state. In other words, when can statewide service begin?

After all, the Georgia legislature provides

millions of dollars in direct support to public libraries. Couldn't public libraries have one statewide catalog on the Internet? Library administrators answered with candor and directness: “It just isn't done!” “It can't be done!”

I was one of those library system administrators. In fact, I became (I am not sure exactly how) chair of the committee that explored this impossible project. I was especially vocal in predicting that the committee would never accept a centralized server—that is, assuming that the

above-mentioned “impossible” became possible by some miracle. My fellow committee members expressed similar reservations.

Our library systems are like fiefdoms. We don't give up our authority and/or independence easily or gladly. After all, we would be expected to change our policies to achieve consensus. Compromise? Never! It can't be done!

A sapling takes root

Well, we have created a statewide library card, PINES (Public Information Network for Electronic Services). And if you don't mind, I prefer my crow to be served with a spicy sauce please, and a side of humble pie.

How did we accomplish such

a thing? The answer is simple: The price was right. At the same meeting in which the bureaucrat asked the shocking questions, he also asked library administrators, “What will it take to get you people to cooperate?” We librarians were on the spot. We had no place to hide. So we sketched out their price. “A circulation system funded by the state—hardware

• *The public already expects*
• *a unified database*
• *and universal access.*

Establishing reciprocal service:

- Grows much more attractive when the price is right.
- Empowers librarians to pool their professional strengths beyond service-area boundaries.
- Satisfies patrons who can't understand why there isn't already a statewide library card.

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and software—with lifetime maintenance” was the first voiced reply. “Okay,” said the bureaucrat. And the deal was made.

The forest before the trees

It was 1998 and the state had funds for Y2K compliance. Libraries with circulation systems that were not Y2K-compliant would be eligible. It was decided, albeit reluctantly, that the most efficient method, in terms of time, cost, and service, would be to have one centralized system with all policies (generally) agreed upon. One card would work at each of the facilities, and out-of-residency policies would be cast into the past and forgotten forever.

Twenty-six systems (out of 57) had automation software that was not Y2K-compliant. The real chiller to the proposed project, however, was that Phase I had to go to bid, be awarded, and be online in 18 months. This included the creation of a unified database of patrons and MARC records for the 26 systems. Future phases would have to be funded separately. Perhaps most harrowing of all was that multiple committees of librarians had to reach a consensus and resolve all unified-policy issues.

As a result, most public libraries in Georgia are discarding their out-of-residency fees. But that's not all: We are literally merging circulation databases. In other words, the network has one vendor, one database, one patron file, and one library card. Policies and many other services such as overdue notification and MARC record acquisition are centralized.

The PINES library card will be usable in almost all public libraries in Georgia. Materials may be borrowed from one system and returned at another. When patrons look at the PINES Web catalog at one of the member library facilities (or on the Internet from home), they can see the holdings of all libraries in the network at the same time. By July 1, 2001, approximately 255 (out of about 370) public library facilities in Georgia will be members. In Phase I and II, 44 of Georgia's 57 library systems will be, or will become, participants.

These two phases of the PINES network will eventually include 105 counties (out of 159 statewide) and serve 4.7 million Georgians, or approximately 61% of the total population. The estimated cost of these two phases is \$12,365,000, which funds training, hardware for over 3,000 terminal stations, software licensing, bar codes, library cards, some wiring, and other miscellaneous supplies. The project has been financed, in part, with funds from the federal e-rate program.

Phase III may increase the number of member systems to 50 and ultimately could include all 57 library systems in Georgia.

Getting 26 independence-minded library administrators and their boards to agree on unified policy parameters was no easy task. Indeed, PINES policies are constantly being reconsidered because unforeseen consequences require rethinking. In some cases, creating a unified policy for PINES is like taking two steps forward and one step backward. All in all, progress is being made, but PINES is literally being invented as it is being created.

Nonadministrative librarians propose many of the rec-



ommendations, which are sent to an executive committee made up of nine administrators who represent the group. This users group is consulted when considering major mission-oriented issues.

A cry in the woods

Some system directors are hesitating to commit to the project and some are unable to join until their current contracts with automation vendors expire. It should be made clear that a few do not intend to participate. They argue that by joining the PINES project their systems will lose too much local autonomy. There are those who claim that by merging databases, their systems will suffer service erosion due to demands from people living outside the local service area. As it turns out, many of these reluctant communities enjoy much higher per-capita local funding levels than neighboring library systems.

Their fears may very well be legitimate. The PINES project is an experiment in progress, akin to building a new airplane in mid-flight. Much is being learned and much remains to be learned.

*Herdin*g cat(alog)s

Creating a unified database for 26 separate systems is another challenge. The Office of Public Library Services, a division of the Board of Regents, has contracted with SOLINET, an affiliate of OCLC, to obtain MARC records. Because PINES is considered a single unit, this arrangement

increases the efficiency rate of MARC record purchasing: Where there would have been 26 systems purchasing the MARC record for a bestseller, for example, there will be only one "system" purchase, with additional payment

only for the expense of adding holdings.

Frequently, small library systems have only basic cataloging expertise. In these libraries, many public service librarians act as part-time catalogers and justifiably feel trepidation when facing the daunting prospect of adding records to a unified database that will be seen by millions of library patrons (to say nothing of suffering the scrutiny of other, more experienced, catalogers). Establishing a PINES network cataloging procedure and a tiered network of experts will help alleviate some of this anxiety.

The PINES network has set up a quality-control campaign to ensure further refinement of the database. The development and maintenance of a high-quality MARC database is a project that will require a concerted effort by all PINES members. Had PINES not been developed, few libraries would have the ability or impetus to upgrade their databases. By combining efforts, we are designing an effective program to improve database integrity.

One state, one constituency

But establishing a reciprocal service arrangement between systems is simply not enough. Such an arrangement may extend services to all citizens in the state, but

it does not allow for any real financial efficiencies. The PINES network permits savings to be achieved without any substantial threat to local authority. In fact, after Phase I, library administrators immediately proposed adding other service areas. Many have requested that PINES include joint acquisitions and vendor contract agreements, increasing economies of scale.

Although the financial incentive of a "free" circulation system certainly makes joining PINES attractive, it is not the member library directors' only motivation. The systems that join must agree to abandon their traditional geographic service borders. Additionally, the PINES project is a significant event in librarianship because it indicates a collective philosophical shift in the profession in Georgia.

Prior to PINES, public library service constituency was primarily limited to either a county or a group of counties (regions) that provided the majority of funding to the library system, despite the fact that part of a public library's financial support comes from "outlanders." Communities with shopping malls, for example, draw people from neighboring communities outside the mall community's library service area. These consumers plunk down good money for sales tax in that community but (usually) cannot check out items at the local library (free of charge). Taxation without public service happens all the time. This provincial "village library" paradigm is more the rule than the exception.

With the development and acceptance of the PINES network, however, a majority of public library leaders demonstrate that there is support in Georgia to view the entire state as the service area even if local

funding continues to exceed state support.

Of course, some states already have statewide service. Citizens of Massachusetts, Connecticut, and Hawaii, to name three examples, may check out materials on-site in any public library in their state free of charge. There is no geographical surcharge on information for those in-state residents. However, most public libraries' service areas elsewhere are still restricted to the immediate community, even if tax support is broadly accepted.

PINES' most important payoff is improved service for the public. Citizens in Georgia can get a PINES library card free of charge. They can go into any of the participating library facilities and check out a book with that very same card. And with very few exceptions, patrons can borrow virtually any item on the (almost) statewide database, which, of course, is accessible on the Internet.

The public has taken our evangelical library message of "information to the people" literally. Consequently, they already expect a unified database and universal access. And so, when all is said and done, the Georgia PINES project is merely public library service catching up to public expectations. ♦

• *Taxation without public service happens all the time. This provincial "village library" paradigm is more the rule than the exception.*

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