

PUBLIC LIBRARY CONSORTIA -- A STUDY TOUR

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I accept responsibility for any errors, omissions, or misinterpretations of information contained in this paper. The opinions expressed in this paper are entirely my own and not necessarily those of the Library Board of Victoria or the Mildura Rural City Council.

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INTRODUCTION

Aim of the study

Victorian public libraries are using consortial activities as one methodology to deliver value to its patrons. The Mildura Rural City Council Library Service has been a member of the MurrayLink¹ group of libraries since it began in 1996, has participated in Gulliver² and the Statewide license for Kinetica³ and is planning to take part in the SWIFT⁴ project in 2005. Thus, as consortia become more prevalent, it seemed timely in the light of the Victorian Public Library context to examine:

1. The structure and governance of consortia;
2. Services offered by consortia;
3. What makes a consortia successful or otherwise; and
4. The issues that are likely to arise when working consortially.

Scope

The Barrett Reid Scholarship enabled me to:

1. Attend the conference organized by CAVAL⁵ titled "*Consortia in the next 25 years*" in October 2003;
2. Travel to the USA to examine two public library systems in the states of Minnesota and Wisconsin during April/May 2004; and
3. Attend a follow-up workshop at CAVAL in August 2004 entitled "*All together now, the how's and why's of library consortia*".

The purpose of the conference "*Consortia in the next 25 years*" was to:

Critically and analytically examine the elements of what makes consortia of real value to libraries now and in the future. Speakers are drawn from Australian and international consortia addressing the major issues with the

¹ MurrayLink is a group of 10 Victorian Public libraries who jointly purchase library materials, who exchange materials, work collaboratively to maintain their catalogues on the web and jointly participate in other collaborative projects.

² A consortial activity of Victorian public libraries that has delivered considerable savings to libraries in the provision of electronic databases to the Victorian community.

³ Kinetica is the National database for materials held in Australian libraries. This licence enabled Victorian Public libraries to search and download MARC records at a cheaper rate.

⁴ A project which will enable some Victorian public libraries to share a Library Management System.

⁵ CAVAL is a consortium of the Victorian University Libraries and the State Library of Victoria .

aim of starting the debate on where the emphases should be placed for the future benefits.⁶

This provided much of the context for the visit to the public library systems in the USA, and gave me background on many current consortial models and the issues faced by consortia today.

The study tour to the USA is the main focus of this report. I selected the Arrowhead Library System⁷ in the State of Minnesota and the Outagamie-Waupaca Library System⁸ in the State of Wisconsin to look at in depth. There would have been a number of public library systems that would have been as equally suitable to study. I chose these two States and Systems because they had many similar characteristics to Victorian Public Libraries – they included city and rural services, they covered a large geographic area, and were composed of a predominantly white, working-class and middle-class population. I also was given the opportunity when I was in Madison, Wisconsin, to interview the director of the South Central Library System.

In order to obtain a more complete picture, I also interviewed State Department staff and Statewide consortial staff to gain an understanding of the relationship between these State level services and the System level consortia; and at the other end of the scale, I also spoke to library staff at individual library services who are members of these two library systems.

Places visited:

1. MnLink. The acronym stands for Minnesota Library Information Network. The three staff are located at the University of St. Cloud, Minnesota. There are 111 libraries who are members of MnLink who share a common Library Management System--these libraries are predominantly State University libraries, private and technical college libraries, with some special libraries and one public library system member that is composed of 32 library services. There are 381 libraries (predominantly public libraries) connected to MnLink using software from Fretwell-Downing. This allows open access to participating Minnesota library catalogues and secured access to available electronic resources. It also provides links to selected free internet resources. Patrons being able to place their own ILLs using the MnLink virtual library is due to be implemented at the time of writing (September 2004).
2. Arrowhead Library System. This is a federated library system of 29 library services in seven counties in the northeast of Minnesota who have agreed to do collaborative and co-operative projects.

⁶ CAVAL Collaborative Solutions 2003, *Consortia in the next 25 years*, CAVAL Collaborative solutions, Melbourne. This text appears on the front of the Conference Program.

⁷ Some information about the Arrowhead Library System, Minnesota is contained in Appendix 1.

⁸ Some information about the Outagamie Waupaca Library System, Wisconsin is contained in Appendix 2.

3. Ely Public Library. (Population 3,724) A small rural public library member of the Arrowhead Library System.
4. Silver Bay Public Library. (Population 2,068) A small rural public library member of the Arrowhead Library System.
5. Duluth Public Library. (Population 86,918) A City public library with a large main branch and two smaller branches. It is a member of the Arrowhead Library System but does not share the same library management system as do the other 28 libraries in the system.
6. Wisconsin Department of Public Instruction. The Wisconsin Division for Libraries, Technology, and Community Learning's Public Library Development Team has the responsibility to provide information on legislation, advocacy, planning, policies, public librarian certification, coordination, and funding to the public libraries of Wisconsin.
7. Wisconsin Library Services. This consortium was set up in 1972 by a number of Wisconsin libraries and currently has 500 members. It is located at the University of Wisconsin and has an emphasis on the sharing of bibliographic information and resources and on inservice training.
8. South Central Library Services. Serves 52 libraries in seven counties in Wisconsin.
9. Reference and Loan Library. The Reference and Loan Library is operated by the Interlibrary Loan and Resource Sharing Team within the Department of Public Instruction. The library staff provide reference and interlibrary loan referral services, loan materials from the collection, develop resource sharing tools, and manage Statewide contracts.
10. OWLS Library System. This is a federated library system serving 17 public libraries in the Outagamie and Waupaca counties. It also provides a shared library automation system to the 43 Nicolet Federated Library System member libraries.
11. Appleton Public Library. (Population 70,087) A city public library which is a member of the OWLS Library System and shares a building with the library system.
12. Waupaca Public Library. (Population 5,676) A small rural public library which is a member of the OWLS Library System.

The final activity was attending the workshop at CAVAL titled "*All together now, the how's and why's of library consortia*" The presenter was Kate Nevins, Executive Director of Solinet. Solinet is a consortium that has 2,545 members from ten states in the USA, and 24 other members. The Objectives of the workshop were to:

1. "explore consortia models and benefits

2. review current consortial activities and
3. explore potential co-operative needs and opportunities.”⁹

WHAT IS A CONSORTIUM?

The Oxford English Dictionary defines a consortium as an association or partnership¹⁰.

Evans¹¹ defines three levels of consortia. The level with the greatest informality and the least risk is often referred to as co-operation. There is sharing of information but each participant retains complete autonomy. This is often used for short-term projects.

Co-ordination is the middle level of activity. While there is a common mission or goals there is usually no legal structure. There may be some contribution of resources to the co-operative activity. Authority remains with the participating members.

Collaboration is the highest level of activity in which there is a very formal, often legal structure created by the participants. Some authority (decision making) is handed over. Participants contribute resources and expect value to be jointly shared.

On the other hand, as Whitehead (2003)¹² points out, reality is more often that consortia may have elements of working along a spectrum which has at one end, a partnership to aggregate demand and achieve a financial benefit and at the other end, a partnership which expresses solidarity, collegiality, and mutual support. Getting together is worth while in itself. There may be aspects of both extremes within the same consortia depending on the activity being undertaken, the mission of the consortia and the values held by the participants.



⁹ CAVAL Collaborative Solutions 2004, *All together now: the how's and why's of library consortia*, presented by Kate Nevins, CAVAL, Melbourne. This text appears in the workbook.

¹⁰ *The Oxford English dictionary*, 1989, 2nd ed. Oxford, Clarendon Press.

¹¹ Evans, GE 2002, 'Management issues of consortia: Part two', *Library Management*, vol. 23, nos. 6/7, pp. 275-287.

¹² Whitehead, D 2003, 'Thoughts on the language of consortia', Presentation to the *Consortia in the next 25 years* conference, CAVAL Collaborative solutions, Melbourne, Oct 27, viewed 24 September 2004, <<http://www.caval.edu.au/about/Whitehead%20CAVAL%20Consortia.pps>>

PURPOSE OF CONSORTIA

Lists of reasons to use consortia as a method of delivering value to our patrons are prevalent. Clark (2003)¹³ lists the following drivers for co-operation: "coordinated collection development; reduced information cost; resource sharing; sharing collections; leveraging investment in staff; [and] pooling expertise".

Whitehead (2003)¹⁴ states that the purpose may "vary a great deal and include financial purposes – to save money; sharing information and understanding; an association to achieve some purpose, run a project or conduct research; jointly engage in a business of some kind – a joint venture; [and to] develop a new idea".

Nevins (2004) believes consortia have come about because of the "demand for information, information proliferation, enabling technologies, need for leverage, and new models". The benefits are: "improved access to resources, development/access to expertise, operational efficiencies, economic leverage, networking, and [to] share risk."¹⁵

In the U.S.A., about two thirds of the States have made funding available specifically to promote co-operation. Broadly, their thrust seems to be to reduce duplication, increase sophistication, to undertake publishing programs (particularly databases), set up improved processes for interlending, improve operational efficiencies (co-operative purchasing is most commonly cited), improve leverage, improve resources, implement new programs, provide a structure for continuing education, and for the management of funds.

In the USA, co-operative activities are promoted at various levels of government. The U.S. Federal Government promotes co-operation via the Federal Government Library Services Technology Act.

The purpose of the Act is:

- "Establishing or enhancing electronic linkages among or between libraries
- Linking libraries electronically with educational, social, or information services
- Assisting libraries in accessing information through electronic networks
- Paying costs for libraries to acquire or share computer systems and telecommunications technology
- Encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources

¹³ Clark, J 2003, 'Where we have come from and where we are now - locally and globally, Presentation to the *Consortia in the next 25 years* conference, CAVAL Collaborative solutions, Melbourne, Oct 27, viewed 24 September 2004, <<http://www.caval.edu.au/about/Clark%20CAVAL%20Consortia.pps>>

¹⁴ Whitehead D, 2003, *ibid*.

¹⁵ Nevins, K 2004, 'All together now: how's and why's of library consortia', Workshop, CAVAL Collaborative Solutions, Melbourne, 13 August.

- Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (birth through 17) from families with incomes below the poverty line."¹⁶

An examination of the mission statements of the consortia in the two States that I visited focus on equitable access, quality, range of information services, shared bibliographic information, resource sharing, training, and cost effectiveness.

MnLink's mission statement is: "All people in Minnesota will have access to a wide array of high quality library services and global information resources in a range of formats whenever, wherever, and however the information services are needed."¹⁷

The mission of the MINITEX¹⁸ Library Information Network is: "to enhance the effectiveness and efficiency of participating libraries by expanding their access to local, state, regional, national and international information resources"¹⁹.

In Wisconsin the State Department of Public Instruction runs several State wide projects such as BadgerLink, Wiscat, and the Reference and Loan Library. The Department states that it provides services so that: "all Wisconsin residents have equitable access to information"²⁰. The Reference and Loan Library uses similar words. It states the services it provides are: "to assure that Wisconsin residents have equitable access to the collective knowledge and information resources in the state's libraries"²¹. BadgerLink emphasizes quality. Its mission is: "to provide access to quality online information resources for Wisconsin residents in cooperation with the state's public, school, academic, and special libraries and Internet Service Providers"²². The State funded union catalogue WISCAT has goals which reflect resource sharing and cost effectiveness:

- "1. To create a resource sharing tool that could be used by Wisconsin libraries of all types and sizes to locate materials for interlibrary loan.
2. To provide a cost effective method by which libraries could convert their collections to the MARC bibliographic standard for use as the basis of local automation projects."²³

¹⁶ Wisconsin Department of Public Instruction, 2004, *Library services Technology Act: LSTA: information and guidelines for Wisconsin*, The Department, Madison, p. 3.

¹⁷ MnLINK, 2003, last updated August 28 2003, *What is the MnLINK gateway?*, MnLINK, Minnesota, viewed 25 September 2004, < <http://gateway.mnlink.org/info/> >

¹⁸ MINITEX is a consortium which provides ILL services, electronic databases, union catalogue of serials and other services to Minnesota Libraries. Libraries in North Dakota and South Dakota also participate in MINITEX programs.

¹⁹ MINITEX, 2002-2004, *MINITEX mission and principles*, MINITEX, Minneapolis, viewed 25 September 2004, <<http://www.minitex.umn.edu/gen-info/about/mission.asp>>

²⁰ Wisconsin Department of Public Instruction, 2004, last updated August 2004, *Public library development*, Madison, WI, viewed 29 September 2004, <<http://www.dpi.state.wi.us/dpi/dlcl/pld/>>

²¹ Wisconsin Department of Public Instruction, 2004?, *Welcome to the Wisconsin reference and loan library*, Madison, WI, viewed 29 September 2004, < <http://www.dpi.state.wi.us/dlcl/rl/>>

²² Wisconsin Department of Public Instruction, 2004?, *What is BadgerLink?* Madison, WI, viewed 29 September 2004, <<http://www.badgerlink.net/more.html> >

²³ Wisconsin Department of Public Instruction, 2004?, *WISCAT project*, Madison, WI, viewed 29 September 2004, < <http://www.wiscat.lib.wi.us/about.html>>

WiLS mission emphasizes the services it offers in the context of information technology: "WiLS, a consortium of member Wisconsin libraries, offers services to libraries in areas of shared bibliographic information, resource sharing, inservice training and other cooperative activities relating to the changing nature of information technology."²⁴

At the library system level, accessibility, service, responsiveness, resource sharing and technology are the main focus although OWLS is a bit different in including governance and funding in their mission statement.

In Minnesota, "The objective of Minnesota's regional systems is to bring to our residents cutting edge information technologies and services that no single library could afford or manage"²⁵.

"The mission of the Arrowhead Library System is to deliver highly responsive and accessible library service to its member libraries and people of the region through a collaborative network of coordinated programs"²⁶.

In Wisconsin: "The mission of the Outagamie Waupaca Library System is to enable access to effective library service for all area residents by coordinating resource sharing, by providing appropriate services and programs, by developing new technologies, and by promoting desirable models for governance and funding"²⁷.

Jim Weikum, Director, Arrowhead Library System, Mt. Iron, MN.



Roxanne and Sharon, Mail-a-book Services, Arrowhead Library System, Mt. Iron, MN.



²⁴ WiLS-Wisconsin Library Services 2004, last modified September 2004, *Mission statement*, WiLS, Madison, WI, viewed 29 September 2004, <<http://www.wils.wisc.edu/missad.html>>

²⁵ *Minnesota's Regional Public Library Systems 2004?*, [Minnesota].

²⁶ Arrowhead Library System 2004, Adopted by the Arrowhead Library System Governing Board on September 9, 2004, *Mission statement*, Arrowhead Library System, Mt Iron, MN, viewed 29 September 2004 <<http://www.arrowhead.lib.mn.us/mission.htm>>

²⁷ Outagamie-Waupaca Library System 2004, Updated August 5 2004, *About OWLS*, Outagamie-Waupaca Library System, Appleton, WI, , viewed 29 September 2004, <http://www.owls.lib.wi.us/about_us/about_us.htm>

LEGAL STRUCTURES

In Victoria, the most common legal structure is the Incorporated Association such as VICLINK Inc. and MurrayLink Inc. Another example of a legal structure is CAVAL which is a company limited by guarantee. SWIFT is considering a structure which is based on participating members signing a memorandum of understanding.²⁸ In South Australia, PLAIN Central Services is a part of the State Library of South Australia and in Tasmania, public libraries are branches of the State Library of Tasmania and therefore the Union Catalogue and other co-operative activities are run by the State Library.

In the USA, their Federal government passed the Library Services Technology Act (LSTA) on September 30, 1996. The LSTA program is administered at the federal level by the Institute of Museum and Library Services.

The LSTA grants and grant categories are not guaranteed for more than a one year time period. New applications must be submitted and approved for each year. There are competitive and non-competitive grant categories. If a category is listed as noncompetitive, eligibility is limited, and the funds are distributed amongst all eligible projects. Competitive grants have a broader base but not all eligible projects may be funded.

In Minnesota, Minnesota's Legislature made money available to support the collaborative regionalization of public libraries. This was completed by the 1980s, with twelve library systems forming. By law every county must be a member of a regional system.

In Wisconsin membership of a library system is voluntary. The Wisconsin legislature passed legislation in 1971 enabling the creation of regional public library systems. Gradually, 17 library systems formed and all 387 public libraries are a member of a library system.

Both the Arrowhead Library System and the OWLS library system are built on the federated model. The OWLS website explains that OWLS is: "a federation of the public libraries in Outagamie and Waupaca counties. Each member library is completely autonomous, funded and governed locally, but contracts with OWLS for the purpose of coordinating and strengthening services. OWLS does not ordinarily provide direct library service; instead, it serves patrons through their local library."²⁹

However, Arrowhead Library System, is not a totally federated system in that it delivers services direct to citizens via a mobile library service and mail-a-book service.

²⁸ Consumer Affairs Victoria is responsible in Victoria for registering and maintaining records on Incorporated Associations, Co-operatives and Limited Partnerships. Further information is available from their website: www.consumer.vic.gov.au

²⁹ Outagamie-Waupaca Library System 2004, *What is OWLS?* Outagamie-Waupaca Library System, Appleton, viewed September 29, 2004. <www.owls.lib.wi.us/about_us/owls_is.htm>

Peter Homan (South Central Library System, Wisconsin) outlines the advantages of the Legislation contained in statutes in his state. "The board can act as a municipality. In law, we may invest any money that is ours or in our custody. This allows libraries to carry over money put aside for projects. The system takes 1% of the interest earned and the library gets the rest. Any two municipalities may cooperate to do anything that either municipality is entitled to do. This allows greater flexibility in partnering on projects, and the system's ability to support projects."³⁰

In addition to the formal legal structures, the Library systems have other documents which set out responsibilities of the library system and the library system members. For example, OWLS has a statement of philosophy which can be viewed on their website.³¹ Wisconsin Library Services incorporation bylaws can also be viewed online.³²

FUNDING OF CONSORTIA

Minnesota

In Minnesota, the ELM electronic databases and the MnLink Gateway as well as the Interlibrary loan service are funded directly by State Government.

The 2002 statistics from the Minnesota Department of Education³³ show that the Arrowhead Library System received 43.7% of its funding from the State, 29.6% from its member Counties, 1.4% from the Federal Government and 20.3% other income.

If income is totalled the library services who are members of the Arrowhead Library System receive 80.6% from Municipal and County funding, 11% from the State, 1.4% from the Federal Government, and 7% other funding.

The State of Minnesota has a dedicated appropriation for the 12 public library systems which they call regional library basic system support. The money is divided by a formula which includes several factors, one being geography. Since geography doesn't change, that percentage is fairly stable. A more complex calculation involves property tax values in each region. The intent is that those regions that experience high property values will get less money than those with

³⁰ From an interview held in Madison 28 April 2004.

³¹ Outagamie Waupaca Library System 2003, *Statement of philosophy*, Outagamie Waupaca Library System, Appleton, WI, viewed 29 September 2004
<http://www.owls.lib.wi.us/about_us/Philosophy.pdf>

³² Wisconsin Library Services 2003, *Articles of Incorporation bylaws*, sixth revision of the bylaws as amended March 31 2003, Wisconsin Library Services, Madison, WI, viewed 29 September 2004.
<<http://www.wils.wisc.edu/govern/bylaw1.doc>>

³³ Minnesota Department of Education, State Library Services and School Technology n.d., *2002 Minnesota Public Library Statistics*, Roseville, MN, viewed 2 October 2004,
<<http://education.state.mn.us/html/072747.htm>>

lower valued property to assist those areas that have lower values. Then the last piece is an equal amount that goes to all twelve systems which is predicated on the idea that the library services all do some of the same things. The member Counties also tax the cities within their boundaries and appropriations are received from each of those seven Counties, largely dependent again on the property tax values. The remainder comes from some fees from the member public libraries and schools who contract with Arrowhead Library System. That is not an historical driving force, and collecting fees is the exception rather than the rule. Some money is also received from various competitive grant moneys from the Federal Government which are administered by the State of Minnesota. There is some income from interest from investments. When a new building was required for the Library System staff, money was set aside from the operating budget. The City of Mountain Iron issued bonds to allow the System to build, investors purchased the bonds and that revenue was used for the building. The investors will be paid back over a 20 year period³⁴.

Wisconsin

BadgerLink which provides electronic databases to libraries and WisCat which is the state union catalogue is funded and run by the State Government.

In Wisconsin there are 387 independent public libraries and 17 public library systems serving 5.4 million residents of the State. Tax support per capita from local and county governments for individual public library services varied but the state average was \$29.78 per capita. When income is totalled for the State for library services, municipalities provided 59.6% , counties 20.9%, state funds accounted for 8.6%, and federal funding and other income accounted for 10.9%.

The Outagamie Waupaca Library system doesn't receive any money from the municipalities--it receives 46.8% from the counties, 17.9% from the state, .9% from the federal Government, 22.1% from contracts (principally from the Nicolet Federated Library System to whom it supplies a Library Management System) and 12.3% from all other income.

³⁴ Weikum J 2004, Interview, Arrowhead Library System, Mt Iron, MN, 20th April, 2004.

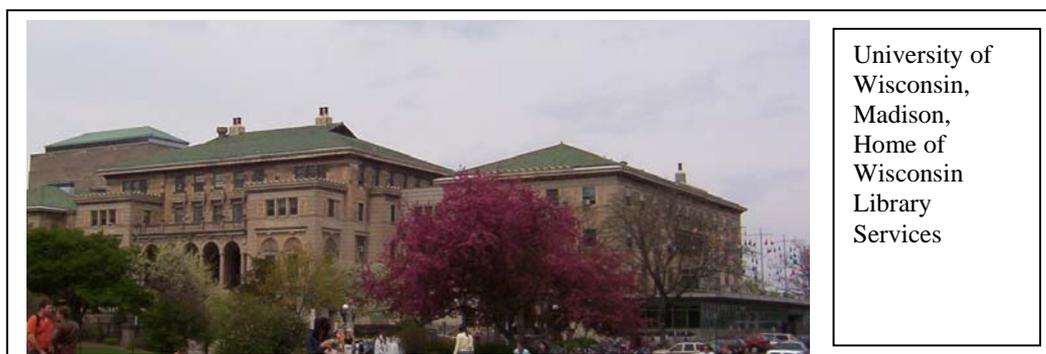
ADMINISTRATIVE AND GOVERNANCE STRUCTURES

The most common arrangement of governance is for the Library Systems is to have a governing Board.

For example, the Governing Board of the Arrowhead Library System consists of twenty-four representatives of the region's citizens and member public libraries. Local library boards in each of the seven member counties elect a total of fourteen local trustees to the ALS Board. The Board of Commissioners from each of the seven participating counties appoint a total of nine citizens to the Arrowhead Library System Board. Then there are eight standing committees: the Annual Meeting Committee; the Buildings & Grounds Committee; the Budget & Evaluation Committee; the Finance Committee; the Long Range Planning Committee; the Nominating Committee; the Personnel Committee; and the Policy & Bylaws Committee.

The Outagamie Waupaca Library System has a governing body composed of 15 members as appointed by the two counties, eleven of the members representing Outagamie County and four of the members representing Waupaca County. OWLS also has an advisory group that is made up of member libraries and the focus in on trying to reach consensus. If there are policy matters, the advisory group makes a recommendation to the Library System Board. There are contracts with all the participating libraries which set out responsibilities, and there is a set of bylaws. Special committees are formed on an as needs basis. As the system has grown larger, so the advisory group has grown larger. However, the group has wanted to keep the representation for each library who is a member³⁵.

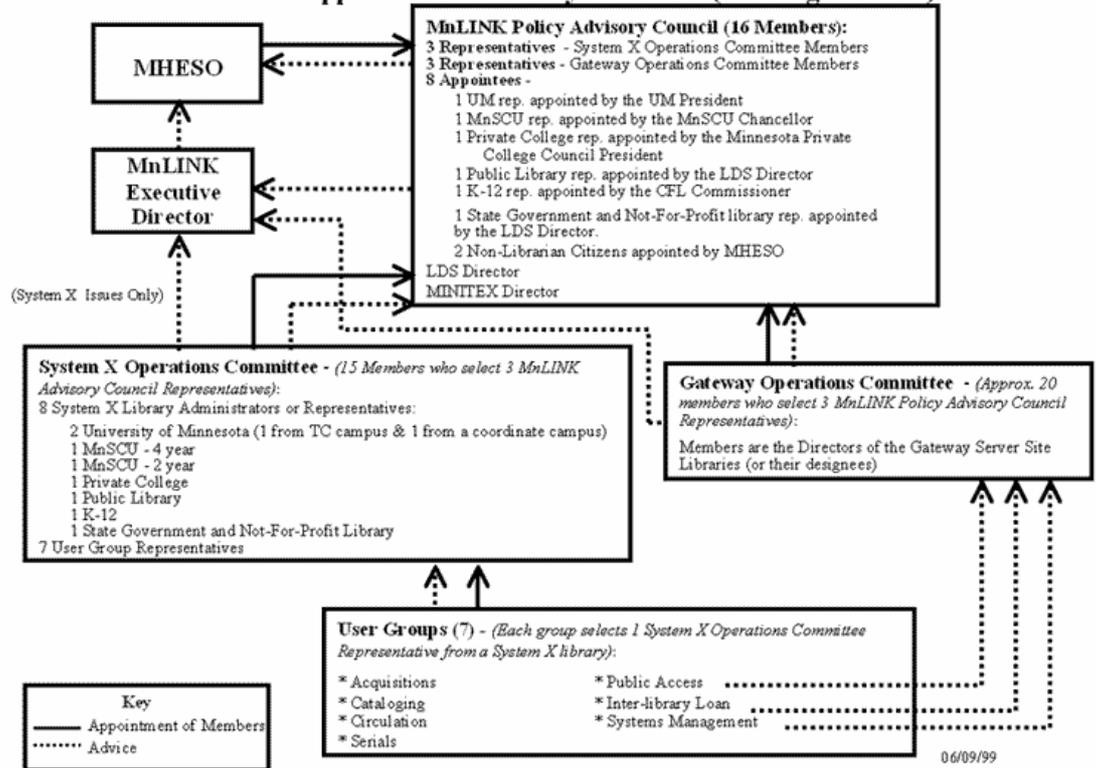
MnLink which has a statewide structure which has more complex links due to its size. The structure works hierarchically with user groups advising the two committees which represent the two major arms of MnLink -- the integrated library management system and the gateway. These committees then advise the Policy advisory council. The MnLink director and the Higher Education Services Office also have a role to play as can be seen in the chart below³⁶.



³⁵ Krumwiede, R 2004, Interview, Outagamie Waupaca Library System, Appleton, WI, 1 May 2004.

³⁶ MnLink 2001, *MnLink appointment advisory structure (starting 7/01/01)*, MnLink, St. Cloud, MN, viewed 2nd October 2004, < <http://www.mnlink.org/defaulta.htm> >

MnLINK Appointment/Advisory Structure (Starting 07/01/01)



SERVICES OFFERED BY THE CONSORTIA

State Level

In both States, the State governments supported the establishment of electronic databases and union catalogues by directly funding them. Minnesota State government has also promoted resource sharing through funding Minitex.

Arrowhead Library System

At Arrowhead Library System, technology projects come under the name of Compass. COMPASS provides a library management system that is administered at the system level, a web catalogue of the holdings of members, links to MnLINK and therefore the Statewide catalogue, administration of internet and staff email services which it provides to its members, group subscriptions to databases not provided through ELM, and joint purchase of hardware and software.

Mail-A-Book is available to rural residents of the seven county region who are house-bound or who live in a town without a public library. A collection of library materials are shelved in the system building. The books are mostly paperback format to save on postage. Catalogues and request cards are mailed to mail-a-

book members who then request items which are sent to them in specially printed bags via the postal service.

Collections. The Arrowhead Library System provides audiobook and video collections which are roving collections. The audiobooks rotate five times per year and the videos rotate eight times per year. The mobile library collection and the mail-a-book collections are maintained by system staff. In addition, there is a library staff professional collection and a collection of storytelling kits.

Training. The library system staff organize regular workshop and opportunities for training which may be: run by system staff; provided by grants (for example, Federal Government technology grants or the Bill and Belinda Gates foundation); or run by State Government staff such as that of training in the use of the ELM databases.

Print services. There are printing services on site, which produce materials for the Summer Reading Programs, brochures for libraries, publicity items and other print jobs.

ILL services. The Library system manages Interlibrary loans that need to be sourced from outside the system and requests for items that are received from elsewhere.

Outagamie Waupaca Library System

Web services. The system provides server space for library web sites, web site design, training and one free Dreamweaver licence per library, FTP software and training, monthly site usage reports and domain name registration.

ILL services. Requests are usually sent through the WISCAT. However, the system handles requests for periodical articles from periodicals owned by Appleton Public Library, Appleton Public Library pamphlets and subject/reference requests. The system will handle incoming requests for items owned by OWLS libraries received from out the system.

Email. OWLS provides an email service for all OWLSnet member libraries.

Graphic Arts Services. OWLS provides design and reproduction services for its member libraries, as well as for system programs such as the Summer Reading Program. They use PC desktop publishing workstation, laser printer, scanner, digital duplicator and a colour photocopier/printer.

Delivery Services. OWLS van visits each member library five times a week. It also exchanges material daily with the Nicolet Federated Library System in Green Bay and participates in the Statewide Interlibrary loan delivery system.

Shared automation network. All system members share the same library management system and they contract with the Nicolet Federated Library System whose members also share the same system. As well as administering

the library management system, OWLS provides technical support, a network library card program, antivirus and security software, upgrades for hardware and software, and access to Gale Group reference databases.

South Central Library System

Online databases. BadgerLink is supplemented by licenses to the Literature Resource Center and WorldCat.

Collections. SCLS spends about \$300,000 annually with Madison Public Library to purchase extra copies of popular items, purchase items not owned by other member libraries, and handle requests to libraries all over the country.

Interlibrary loan services. LINK, the Library Interchange Network, is a consortium of public libraries that work together and with South Central Library System to create a network of shared computer systems and services. LINKcat combines the library catalogs of all LINK libraries.

Delivery services. SCLS has gone into business delivering interlibrary loans across the State. The System delivered over 9 million items in 2002.

Other Automated services. These include telemessaging, internet access, email and e-lists, video equipment for meetings etc, training lab, portable wireless lab, conducts experiments in new technologies, and provides computer technician services.

Consultants. These include consulting on library management, new library buildings, and new technologies.

Funding. The System seeks funding through government grants and private grants.

Programs. The System subsidizes Summer reading programs, assists in providing other children's programs, and services to users with special needs

Library Advocacy network It runs a database of people who sign up to support library services when they are called upon.

MANAGEMENT ISSUES

Many of the issues relating to whether a consortium will be a success, and what hinders the success of consortia are similar to or the same as managing organisations and/or project management. However, they are worth repeating here. In addition, there were some particular issues that were prominent in the consortia I visited and these are outlined separately.

Success factors

Writers and interviewees emphasized the importance of sharing a common purpose and vision and staying focussed on this. If the main goal of the project or organization was to ensure equal access, then all decisions were held up to this guiding principle to ensure that it furthered that aim.

There needed to be clear expectations which were documented, . The consortia I visited tended to do this through their policies, outlining responsibilities, levels of services offered to differing membership categories, their missions, bylaws and Owls has also written a statement of philosophy.³⁷

Every participant needs to see benefits from co-operation. In Minnesota, for example, it was informative to visit Duluth, the largest public library in the Arrowhead Library System, because they were the only library who didn't participate in the joint library management system. Although part of the reason was timing, (they automated before there was a public library system), there was also no compelling reason in their view to change. They had IT support and expertise within their Municipality and therefore they didn't need the type of service being offered by Arrowhead Library System. The downside of this was that it added a layer of complexity in locating items within the system as there is a need to search two catalogues, the union catalogue produced by the 28 libraries who share a system and the Duluth Public Library Catalogue.

Sustainable funding. This was achieved through State and Federal government appropriations, membership fees, contracted services, fee for service and from county contributions. The State Governments were willing to fund a large proportion of the consortial expenditure. Whereas the individual public library services in these two states typically received between 10% and 20% of their funding from the State Government, the Library Systems received between 40% and 50%, and other projects such as electronic databases were fully funded by the State Governments.

Being able to deliver useful, high quality products and services entrenches the need for co-operation. Sharing of collections, resources, union catalogues etc. were seen as much more problematic for public libraries to sustain without consortial structures in place. However, as particular services become no longer useful, there is a need for flexibility and being able to respond to needs and to build on and change services.

Human factors also contribute to the success of a consortium. Trusted peer relationships, a balance of power, active involvement, a spirit of consensus and flexibility, and an ability to see beyond one's own library service are desirable attributes of a consortium.

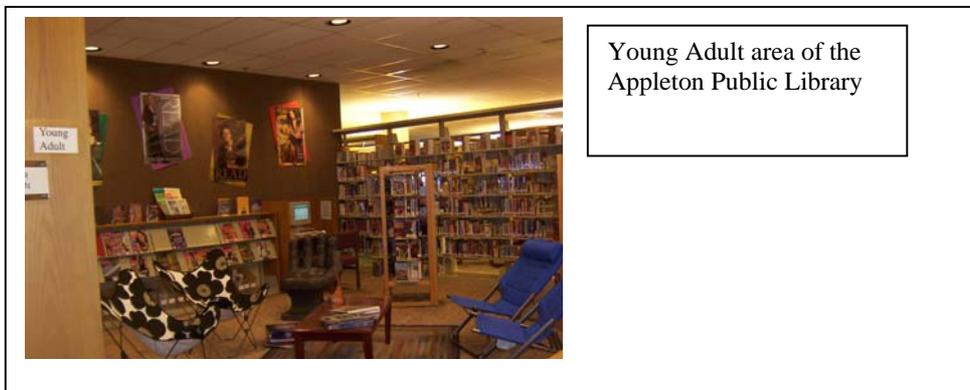
³⁷ Outagamie Waupaca Library Sytem 2003, *ibid.*

Hindrances to the success of a consortium

Those governing consortia need to be aware of good management practices as in all organizations. If they are not managed well, they may not deliver the expected value. Peters (2003) gives an excellent summary of what the pitfalls can be and I quote from his article

Hindrances may include:

- Too many meetings
- Time delays
- Inefficiency. "We should all remember that the lure of consortial activity is not efficiency, but cost avoidance and capitalizing on opportunities that would be difficult or impossible to realize if libraries acted unilaterally."
- Ineffectiveness. "Maintaining the interest; energy, and momentum of a disparate group of people is difficult, especially when the activity is not their day job."
- Ineffable. "Sometimes the outputs and outcomes of consortial collaboration are too difficult and complex to express."
- Sustainability issues. "Enduring resource commitments to consirtial programs are rare."
- Scalability issues. Expansion may be limited by the resources, information technology capability or increase in complexity.
- Too many. There can be a trap in forming too many consortia to which a library service needs to devote time and energy, especially if there are crossover activities.
- Too ossified. They may need to reinvent as needs of libraries change.
- Idea and reality out of whack. "There is a tremendous tension between collaboration as an ideal and as a lived experience."
- Competition trumps collaboration. "Appealing to the higher nature of humans in order to obtain sustained, often thankless, effort from them is fraught with danger."
- Surly Alexandrians. This is the dichotomy of wanting to have everything available at our fingertips on the one hand but also wanting to compete and hoard.³⁸



³⁸ Peters, TA 2003, 'Consortia and their discontents', *Journal of Academic Librarianship*, vol. 29, no. 2, pp. 111-114.

Standardisation

One of the major issues which directly relates to consortia has been standardization. At the individual library services I visited, while each library service has retained a great deal of autonomy, there has been agreement to standardise practices where this will enhance rather than detract from services offered to their community.

Examples are given below.

1. Standard practices for resource sharing. At OWLS some of the driving force for this was size. The director stated "The larger we became, the more we do things the same way the better".³⁹ Backed up by the philosophy of equal access and sharing what is available has meant that OWLS handled 320,000 interlibrary loans in 2003 and standard practices has improved efficiency and effectiveness in handling this many items.

2. Standard cataloguing. At OWLS, in order to maintain standardized cataloguing, cataloguing was originally done centrally and library services just added their holdings if there was a record already on the system. Now it has become decentralized to some extent, as there are about six to nine libraries that contribute records. Only two libraries are doing original cataloguing. Standard cataloguing has been promoted to improve the reliability of results from catalogue searches and to aid with educating the public in cataloguing policies. For example, whether every version of an item has its own bibliographic record or at the other end of the scale whether every copy of the same title will be attached to one bibliographic record.

3. Standard circulation practices. Where patrons use more than one library service, it is easier for them if circulation rules are the same. OWLS has been encouraging this and some of its members have standardized their practices (eg. loan periods, fines for overdues).

4. Standard indexing. In Minnesota, there is a State-wide committee on indexing standards. Where you have a state that has more than one library management system, then search parameters may vary. In a union catalogue, a subject keyword search may search in different MARC fields from individual library services. For example, some library services may have set it up to search in note and abstract fields, but others to search only in the subject headings fields.

5. Standard library management systems and other software and hardware. Library services have done this so that they can maximize the use of consortial staff expertise and buying power, and to maximize the sharing of expertise amongst themselves. It has also made resource sharing less complex amongst these libraries.

6. Standard interfaces. This was particularly mentioned in relation to electronic databases. Interviewees reported that patrons preferred a standard interface and

³⁹ Krumwiede, R. 2004, *Interview*, Outagamie-Waupaca Library System, Appleton, 1 May 2004.

it was easier for training purposes, both when consortial staff trained library staff, and library staff trained patrons how to search online databases.

Other issues

How best to achieve more even access across a State. The levels of discussion at the set-up of MnLink for example, were that some areas of the State were being underserved particularly in their ability to get access to collections. The first suggestion was for all libraries (academic, public and school) to share the same library management system. However, not all libraries were able or wanted to join; some felt they had special needs such as children's interfaces and readers advisory needs that would not be met in a joint library management system which included a large number of academic institutions. The hybrid developed of 111 libraries sharing a library management system and 381 libraries using linking software. One ongoing issue is that the linking software is more complex and therefore more expensive to maintain, mainly in terms of manpower. If funding is given for establishment costs, then a joint management system may be preferable; if recurrent funding is given for a project, then linking software may be preferable.

Balance of power. Issues mainly arose in this area where there is a disparity in size. Duluth, for example, in the Arrowhead Library System, felt that a lot of services offered by the consortia were more suitable for small library services, and were ones they didn't particularly need. Some of the ways that I saw of overcoming this issue were:

- To ensure one library one vote, or even representation across multi-type libraries (for example, in the MnLink structure);
- Recompense for large libraries when citizens from other areas used their library services; and
- Direct funding of collections for particular libraries, who held these collections on behalf of the members of the consortia.



At left, Beth Kelly, Library Director Duluth Public Library.
Above, Duluth Lighthouse, Lake Superior.

Extent of service. As policies and responsibilities tended to be well documented, this wasn't a major issue. It arose more in the day-to-day management of projects. It appeared that some library services required more

support either temporarily or on an ongoing basis, These fluctuations in need for service were usually tolerated as part of the management of a consortial activity.

CONCLUSIONS

I believe that consortia should play a role in delivering service to the communities served by Victorian public libraries. Based on this study tour, I have seen projects that can be better done together rather than as individual library services. I would go so far as to say that we are unable to achieve public library development in some areas of service that are needed and demanded now by our communities without the establishment of co-operative activities.

Keeping in mind the factors that are necessary for the success of these co-operative activities as outlined in this report and what can go wrong, I believe that projects which extend access to a greater number and range of resources, which test and integrate new technologies and new ways of using technology to improve services, which pools resources for projects to save money, which develop expertise beyond the ability of one individual library service to attain, and which improve advocacy for public libraries, are worthwhile.

Does Victoria have suitable legal structures available? There are legal structures in place in Victoria such as Incorporated Associations, Co-operatives and Limited Partnerships which can be used to act consortially. There is also the ability to receive dispensation from legislation and regulations from the appropriate State Government Minister for some aspects of projects. However, such arrangements do not appear to fully satisfy the needs for co-operative activities of local government. There may be a need for additional or changed legislation to allow co-operative projects to fully utilize resources available. (eg. In the holding of money on behalf of Library Services, to allow Library Services to join a consortial activity without new tenders being called, to make a profit, to employ staff, etc.) On the other hand, maybe what we most need is some training in how to legally set up consortia easily and efficiently using current legislation. I think that this is an issue that should be addressed.

Are there appropriate administrative structures that could be used by Victorian public libraries? Administrative structures that are well-accepted by Victorian Public Libraries such as VicLink, CPLG, and MurrayLink, could, I believe, be easily adapted to the administration of public library consortia. These three examples operate with a membership base, an executive, and special committees as necessary. Some adaptations, depending on the project, may include a board (very popular in the USA), levels of membership rights, and/or representation from outside bodies. These administrative structures need to be supported by documents such as mission statements, membership conditions, statements of philosophy, bylaws etc. These documents need to be made readily available to all members. This can probably most easily be done through the Internet.

Is there sustainable funding available? What a difference it would make if support for consortia through State Government funding was evident and ongoing for Victorian Public Libraries. I am not implying that co-operative projects amongst libraries have not been supported. MurrayLink, for example, has been fortunate to receive funding for roving collections, for a joint Italian collection and for a technology project. Gulliver was also originally funded. However, this has been funding for specific projects, not for staff, administration, or ongoing consortial activity. In the two States I visited in the USA, the State Government supported consortial activities, either by directly funding projects at State level (including ongoing funding for staff and administration), or by funding libraries to get together and form a library system to manage consortial activities. For example, in Minnesota, the philosophy of the State Government was that citizens have equal access to resources. Therefore: because electronic databases were an additional cost that some library services could afford and others not; because a uniform set of databases would help fulfil the equal access goal, and because they could deliver better value by negotiating a Statewide licence than giving funding to individual library services, the State funds the provision of electronic databases. The ongoing administration of the project is also funded by the State. Another example of State funding is for the establishment costs of a project. A 12 million appropriation was used to establish the MnLink project. This paid for staff to manage the project, for initial equipment and software, and for upgrades to technology infrastructure at the individual library level. These two examples are important to illustrate the need for funding at State level to avoid some library Services bearing the burden of the work involved in the establishment of a statewide activity (such as happened here in Victoria with Gulliver) or the complication of funding of a project when cost apportionment is uneven, or unable to be realistically determined. An example of this is the SWIFT project, where establishment costs, development costs, administrative costs etc. are difficult to divide particularly when there is likely to be new participants over a period of a number of years. For consortia to be sustainable, particularly for large and complex projects, State Government processes for funding need to be in place or for national projects, Federal Government funding should be available.

Finally, I believe that there are useful programs that would be best managed through consortial activity, similar to the services offered overseas. Right now, I would assert that the most obvious ones are:

1. Union catalogue. Improving access to the resources held by individual Victorian Public Libraries to all Victorians through such processes as union catalogues and/or confederated searching across catalogues and databases.
2. Statewide library card. In the State of Tasmania you can use your membership card at any of the libraries in that State. The SWAP library network is a group of seven library services in South Australia who have also got together with a common library card. I believe that Victorian library users would also appreciate this service.
3. Development of the Public Library information portal for all Victorians. The work done on aggregating public library information on the Libraries Victoria site

is the beginning of what could be an enormously useful resource for all Victorians.

4. Joint collections. One example already raised in Victoria is for LOTE collections to be pooled and held jointly to better fill the needs of patrons. In South Australia, the State Library holds collections such as video and film and LOTE from which it lends items to public libraries. In the USA, I saw collections as diverse as professional development material, to expensive storytelling kits, to DVD collections which were shared on demand, or specifically rotated amongst library services.

4. Co-operative purchasing. This has already proved to be a success in delivering electronic databases through the Gulliver project, and in delivering improved discounts and freight free delivery of library materials to MurrayLink members. PLAIN in South Australia has a business manager who negotiates and manages the contracts for library materials, monitors pricing in the marketplace, and includes services such as managing invoicing, tracking of orders, and fund expenditure. PLAIN claims to provide cost-effective services to public libraries which they could not otherwise realise.. When expertise is developed, then the contracts can be across a wide range of areas, and can be developed for libraries separately or in conjunction with contracts negotiated by for example, the MAV. Another example: in the USA, the co-operative purchasing staff member at the Winconsin Library Services purchased items such as barcodes, equipment and anything needed by a large number of libraries as well as electronic databases.

My belief is that Victorian public libraries should be giving ongoing serious consideration to worthwhile joint projects and joint partners to enhance our services to our community.

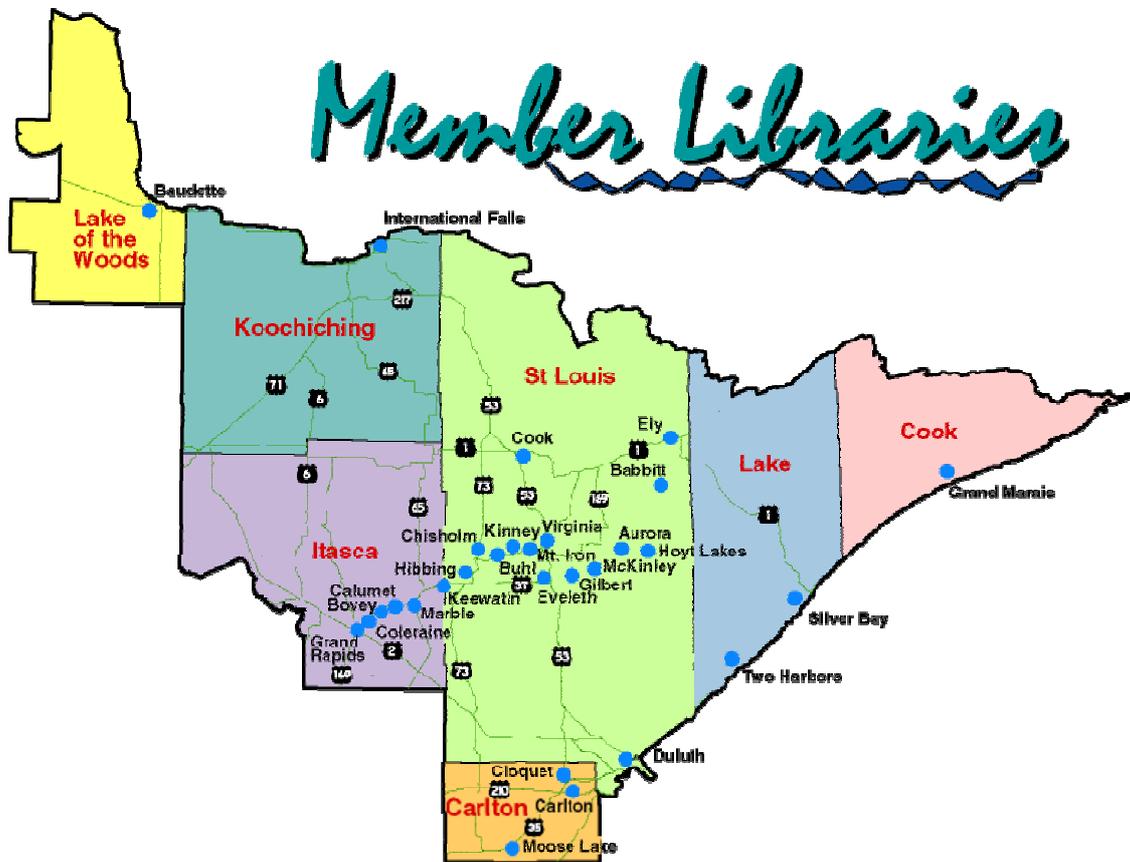


Interior of section of Ely Public Library



Pine woods, between Mt. Iron and Ely, Minnesota,

Appendix 1: Arrowhead Library System, Minnesota.



Source: <http://www.arrowhead.lib.mn.us/> [accessed 14/08/04]

Statistics below are for 2002

Population served: 311,248

Combined circulation of the library services: 2,497,597

Combined number of items held by the library services: 1,524,571

Average per capita spending: \$35.53

Staffing at the Arrowhead Library System: 4 Librarians, 16.63 other staff

Income for the Arrowhead Library System: Local: \$773,060 State: \$1,141,260

Federal: \$165,219 Other: 530,555

Appendix 2: Outagamie Waupaca and Nicolet Library System



Source: http://www.owls.lib.wi.us/owlsnet/about_us/OWLSnet_map.htm [accessed 14/8/04]

Statistics below are for 2002

Population served: OWLS: 228,471 Nicolet: 414,483

Combined circulation: OWLS: 2,439,958 Nicolet: 3,491,296

Combined number of items held: OWLS: 804,051 Nicolet: 1,075,659

Staff of OWLS: Librarians: 4 Other: 7.88

Average per capita spending: \$30.10

Income for the Outagamie-Waupaca Library System: Local: \$1,569,574 State: \$601,449 Federal: \$28,700 Contract income: \$742,056 Other: \$412,195

Appendix 3: Websites

Acronym	Organization or Project name	Website
	Appleton Public Library	http://www.apl.org/
	BadgerLink	http://www.badgerlink.net/
CAVAL	Caval Collaborative Solutions	http://www.caval.edu.au/
	Duluth Public Library	www.duluth.lib.mn.us
ELM	Electronic Library for Minnesota	http://www.elm4you.org/
	Ely Public Library	www.elylibrary.org
	Gulliver	http://www.libraries.vic.gov.au/cgi-bin/library_links/dbases.cgi
	Kinetica	http://www.nla.gov.au/kinetica/
	Minitex Library Information Network	http://www.minitex.umn.edu/
	Minnesota Department of Education	http://education.state.mn.us/html/mde_home.htm
MnLink	Minnesota Library Information Network	http://www.mnlink.org/
	MurrayLink	http://www.murraylink.vic.gov.au/
OWLS	Outagamie and Waupaca Library System	http://www.owls.lib.wi.us/
PLAIN	PLAIN Central Services	http://www.plain.sa.gov.au
	Reference and Loan Library	http://www.dpi.state.wi.us/dtcl/rl/
	Silver Bay Public Library	www.silverbay.com:80/library.htm
	Solinet	www.solinet.net/
	South Central Library Services	www.scls.lib.wi.us/
	State Library of Tasmania	http://www.statelibrary.tas.gov.au/
SWAP	SWAP Library Network	http://www.swaplib.sa.gov.au/
	Talis	http://www.talis.tas.gov.au:8000/
	Waupaca Public Library	http://www.waupacalibrary.org/
	Wiscat	http://www.wiscat.lib.wi.us/
	Wisconsin Department of Public Instruction	http://www.dpi.state.wi.us/index.html
WiLS	Wisconsin Library Services	http://www.wils.wisc.edu/

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