State Superintendent's Report on Interlibrary Cooperation and Resource Sharing
1995-99

Introduction

The state superintendent, Department of Public Instruction (DPI), is required to report on interlibrary loan cooperation and resource sharing each biennium. This report focuses primarily on the activities of the Division for Libraries and Community Learning (DLCL) in the previous and current biennium relative to the state superintendent's responsibilities to promote library cooperation and resource sharing.

The four year period covered by this report included times of extreme instability and also times of increased opportunity. The 1995-97 biennium continued a period similar to the previous biennium in that there were no increases in public library system funding or state level interlibrary loan and other contracts. At the same time there were major cuts in DLCL staffing.

The current (1997-1999) state biennial budget included increases in funding for public library systems and state level interlibrary loan and other contracts for the first time in four years. The DPI also got a reprieve, for the most part, from the deep cuts that took their toll in the last two or three years.

Technological developments provided libraries with increased opportunities for expanding access to knowledge and information resources for the state's residents. Libraries embraced these new technological opportunities. The level of technology implementation, however, continues to vary

widely in the library community and poses the real danger of creating information "haves and have nots." The DLCL made major efforts to assess the status of technology development and to plan and begin implementation of technology initiatives that would benefit all types of libraries.

At a Library Technology Planning Conference held in 1998 and discussed further in this report, the library community developed a vision the DLCL hopes will serve as a catalyst for future planning and cooperation. The ultimate goal is to realize the vision that:

All Wisconsin residents have equitable, convenient, and universal access to the information and knowledge resources they need to meet personal, work, educational, and community goals. This is facilitated by the participation of Wisconsin libraries in statewide networks linking library resources through appropriate technology and technology standards.

The conference used the motto "Access—for anyone, from anywhere, at any time."

The DLCL initiated BadgerLink, which includes World Wide Web (WWW) access to full-text information for magazines and newspapers, WISCAT, state and federal government information, other DPI resources, and links to other websites. The DLCL hopes to expand BadgerLink to include a larger information network that links various kinds of information at the state, system,

Continued on page 2

Public Hearing
Friday, Nov. 13, 1998

The Role of COLAND

By Cal Potter
DLCL Administrator

The Council on Library and Network Development (COLAND), created in 1979 by the Legislature, provides recommendations to the state superintendent, the governor, and the Legislature on improving library services in our state. This fifteen member body includes seven members who represent libraries and eight public

PUBLIC   SCHOOL

ACADEMIC   SPECIAL

Please see COLAND—page 7

Special Report

and local level.

Wisconsin Statutes, chapter 43
Stat. 43.03 General duties of state superintendent. The state superintendent shall:

(3)(a) Promote cooperation and resource sharing among public libraries, school libraries, other types of libraries and related agencies.

(b) Plan, coordinate, evaluate and set statewide priorities for the development of networks to enable library cooperation and resource sharing within this state and between this state and resource providers in other states.

(d) Submit to the Council on Library and Network Development a biennial report which describes the programs and policies carried out under pars. (a) and (b) in the preceding biennium and the programs and policies to be carried out under pars. (a) and (b) in the succeeding biennium.

Stat. 43.07 Council on Library and Network Development. The state superintendent and the DLCL shall seek the advice of and consult with the council on library and network development in performing their duties in regard to library service... The **council** shall:

(4) Hold a biennial meeting for the purpose of discussing the report submitted by the state superintendent under s.43.03 (3)(d). Notice of the meeting shall be sent to public libraries, public library systems, school libraries and other types of libraries and related agencies. After the meeting, the council shall make recommendations to the state superintendent regarding the report and any other matter the council deems appropriate.

Library Services and Technology Act
The Library Services and Technology Act (LSTA) was signed into law on Sep-

t. 30, 1996, by President Clinton. It replaced the Library Services and Construction Act (LSCA) program that had been in existence, in various forms and with various priorities, since 1956. The new LSTA program represents a modernization and reconfiguration of the LSCA, building on the strengths of that program, but sharpening the focus on technology, resource sharing, and targeted services. The six LSTA purposes, as outlined in the legislation are:

- 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; and
- 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.

The LSCA and LSTA programs have had, and will continue to have, a significant influence on the direction of technology and resource sharing in Wisconsin. They have enabled Wisconsin to plan for, demonstrate and implement statewide, system and local library projects over the years, including many of the projects listed in this report. A five-year LSTA plan developed for Wisconsin outlines the priorities and activities for the use of the LSTA funds for 1997-2002.

Library technology planning

In April 1997, the state Legislative Council's Special Study Committee on Public Libraries recommended that the DPI, in cooperation with the Department of Administration (DOA), hold a Library Technology Planning Conference with participation by all types of libraries. The conference, cosponsored by these two agencies, was held Feb. 23-24, 1998, and included 84 participants from all types of libraries.

The conference participants addressed five issues through group process and priority setting exercises. Participants

developed ideas and priorities concerning "Features of State-wide Electronic Networks," and then working in smaller groups discussed four other issues: 1) training; 2) technical assistance; 3) document delivery; and 4) educating decisionmakers.

Features of Statewide Electronic Library Networks: There were more than 400 individual comments related to this topic. The top priorities can be summarized under the categories of network access, the user interface, and access to content. Network access priorities included Internet access for all libraries, linking automated systems, flexible interlibrary loan, and state-wide delivery of electronic and print resources. User interface priorities included a GUI-based (graphical user interface) web interface, different levels of use, cross platform support, and training. Content priorities included access to library collections, statewide licensing of full-text and other databases, and developing a list of quality web resources.

Training Issues: Some of the needs identified by these workgroups included methods for training staff and patrons, use of distance education (e.g., videoconferencing), use of computer-based training (CBT), and training focused on topical issues (e.g., licensing, copyright, policy development).

Technical Assistance Issues: The top recommendations in this area included setting a base level of funding to provide adequate hardware/software/high-speed Internet connections in every public library, and a state-defined minimum standard for hardware/software and network access. Also mentioned was the need for a hierarchy of state and regional-level specialized personnel in areas like technology implementation, web page design, network design/administration, training and security.

Document Delivery Issues: The major findings from the workgroups on this issue were the need for all libraries to have access to effective delivery services, the need for multiple or flexible delivery options, direct electronic access to content, and direct delivery to patrons.

Educating Decision Makers: Some of the key issues discussed included the need for regular communication with key stakeholders and other groups and the need to demonstrate linkages among networks and show how a statewide library network is dynamic, not static. Another key theme was the need for a coordinated state lobbying effort by the library community, emphasizing how the network will benefit all libraries and citizens.

The DLCL published two documents following the conference. *The Library Technology Planning Conference Report* was authored by facilitator Debra Wilcox Johnson and contains a full summary of conference activities, ideas and priorities. *The Wisconsin Library Technology Strategic Plan* was authored by Bob Bocher and contains five goals that will serve as a blueprint for activities in the remainder of the 1997-1999

Special Report

biennium and for the 1999-2001 biennium.

- All state residents have access to a statewide library network that provides access to information from libraries and other locations.
- Libraries have collections that meet the needs of their primary clientele and also are available to other Wisconsin residents through a statewide library network.
- A comprehensive materials delivery system supports the sharing of library materials throughout the state.
- Training for library staff and patrons is incorporated at every level of a statewide library network.
- The DLCL for Libraries and Community Learning leads and facilitates implementation of a statewide library network.

The Internet and telecommunications

The DLCL provided $532,000 in Library Services and Construction Act grants to public library systems between 1995-1998 for the purpose of providing Internet access for public libraries in their system areas. A total of 85 percent of the state's public libraries had Internet access as of 1998. This was an increase from just 6 percent in 1994.

In 1995, the DPI and DOA secured a second TIIAP (Telecommunications & Information Infrastructure Assistance Program, U.S. DPI of Commerce) grant that supplied funding to provide Internet access and training for schools in using the Internet in classroom applications. The grant also included funding for the initial experimentation with WISCAT online, the purchase of a file server to make access possible, and the purchase of an Internet server for the DPI.

In the 1997-99 budget, the governor proposed the TEACH program (Technology for Educational ACHievement) which provides support for educational technology and telecommunications access for eligible organizations. The program is designed to accelerate the use of technology by K-12 schools, libraries, and higher education. The program includes $210 million over the biennium in block grants and loans to schools. The DPI has assisted DOA and schools by allocating personnel for consultation to get the project operating.

In 1996 the federal government passed legislation that allocated funding from the Universal Service Fund for libraries and schools to pay for telecommunications services. The program, popularly referred to as the E-rate (Education-rate), is designed to provide K-12 schools and public libraries with discounts from 20 percent to 90 percent on costs related to telecommunications, Internet, and internal connections. DLCL staff have kept libraries and schools informed of the E-rate

program and provided major assistance in applying for this funding.

Linking automated library systems

In 1996, the DLCL established a committee to explore the possibility of linking shared circulation/online catalog systems operated by public library systems. The committee examined the status of shared automated system development in public library systems, discussed various scenarios for linking systems, looked at demonstrations in other states, discussed the purpose and scope of the Z39.50 national standard for linking automated systems, and reviewed interlibrary loan protocols that would need to be modified or changed as a result of linking systems. The committee members established a pilot project that allowed them to dial into each other's systems and place holds on library materials without actually linking the systems using outside software.

In January 1999 the DLCL will award LSTA funds to demonstrate a multitype library model for linking shared automated systems, WISCAT, and interlibrary loan systems. A committee will be appointed with representatives from all types of libraries to oversee this project.

Full-text information

The participants of the Library Technology Planning Conference strongly recommended that the DLCL provide access to full-text information for magazines, journals, and newspapers. The DLCL allocated $2.1 million in LSTA funding for the period July 1998 through December 1999 to provide access to full-text information.

The DLCL appointed a committee to help select a vendor or vendors to provide full-text information services. This committee assisted staff in setting goals for the project, developing a Request for Proposal (RFP) for the service, evaluating the vendors, selecting vendors, and developing training and publicity plans. Members also will assist with evaluation plans.

The DLCL selected two vendors to provide full-text information services: EBSCO is providing access to over 4,000 magazines, journals, and other reference materials; and UMI is providing access to over 40 newspapers including 13 Wisconsin newspapers.

The DLCL is making these services available to libraries, schools, businesses, and other organizations and to Wisconsin residents at home, office, or other locations.

WISCAT

WISCAT is Wisconsin's statewide bibliographic database of library holdings. As of January 1998, the database contains

nearly 6 million titles and 28 million holdings of 1,137 Wisconsin libraries of all types (360 public, 78 academic, 636 school, and 63 special libraries).

The DLCL negotiates and manages the contract for the production of WISCAT and provides technical support to WISCAT users for installation and use of the CD-ROM hardware and the Le Pac software. In addition, staff provide technical support for WisCon and other software used for conversion of library records to machine readable form, and the MITINET/marc software for the creation of full national standard MARC records for titles not already on WISCAT.

During 1995-97, the DLCL worked on development of an online version of WISCAT. Brodart was selected through a bid process to provide online access to the database and developed two methods of providing such access for evaluation by test users. Fifteen Wisconsin libraries tested a remote access site and a World Wide Web (WWW) version of WISCAT on file servers operated by Brodart. The DPI determined that the WWW version would be the most beneficial, and in January 1997 the site was made available to all libraries using funding received through the Telecommunications Information Infrastructure Assistance Program (TIIAP). Because there were insufficient funds available to pay for the online licensing fees on an ongoing basis, libraries were charged for the use of WISCAT in 1997. In January 1998, WISCAT was made available for free so that both library staff and Wisconsin residents could use the software. The WWW version of the WISCAT database provides "read only" access.

DLCL staff have worked with Brodart to completely redesign the WISCAT database structure and access software during 1996-1998. Brodart has developed client software that allows library staff to update holdings to the database and create interlibrary loan requests. An interim version of the client software was released to library staff in June 1998. The interim client replaced WisCon software for online users. A revision of the client software containing more advanced features will be available in 1999.

The revised database structure, also expected to be available in 1999, will allow records to be added to the database more frequently, and the DLCL intends to update WISCAT records and holdings on a monthly basis. Library staff using the client will be able to update the database as they add, change, or delete records. The database structure will be compliant with the Z39.50 standard that allows linking of bibliographic databases.

Staff also began work in 1997 on a union list of serials that will be compatible with WISCAT and will be issued as a separate CD-ROM disc and available as a part of the online version of WISCAT. The union list of serials is expected to be available in 1998.

The CD-ROM version of WISCAT will be phased out with the introduction of the new database structure and release of the revised client software.

QuILL automated interlibrary loan system

In 1995, the Reference and Loan Library staff completed testing of the interlibrary loan software developed under a contract with Brodart. QuILL allows libraries to access the WISCAT software to create interlibrary loan requests, send these requests directly to other libraries or to a system clearinghouse, and maintain records on the status of requests and statistics. Libraries have experienced faster access to library materials and increased productivity as a result of the use of QuILL. As of July 1998, more than 100 libraries are using QuILL, including all public library system clearinghouses. Seven systems are using QuILL within the system area with their local libraries. The bulletin board system was discontinued in 1997.

Interlibrary Loan Task Force

The Interlibrary Loan Task Force appointed in 1994 to identify and discuss effective patterns and methods of resource sharing among all types of libraries issued a report that was distributed in 1996. The report included issue statements in five areas including the effective development and use of electronic resources, ways to improve interlibrary loan and reference referral tools, better ways to educate library users about interlibrary loan and reference referral services, adequate training for library staff, and means of assuring equity of access to services throughout the state. The Task Force discussed and recommended which elements should be considered a part of basic interlibrary loan service and developed a statement describing these elements. The *Interlibrary Loan Guidelines, 1996* revised and updated the past guidelines last issued in 1985.

The Reference and Loan Library improved interlibrary loan access to its videocassette collection by placing the title catalog of videocassettes on the DPI's web page. The catalog can be searched by key words and libraries of all types can reserve materials for specific dates or place requests directly for materials from the catalog. The catalog includes those titles contributed by the Bureau of Audio Visual Instruction that have not yet been added to WISCAT.

Reference and Loan Library Reference Services

To cope with diminishing budget allocations for print and nonprint materials, reference staff began evaluating all prospective purchases on the basis of how items would be used to fill subject requests. Staff also visited and made arrangements with the University of Wisconsin-Memorial Library and Madison Public Library to do onsite reference work, using these local collections when the information needed could not be located at the Reference and Loan Library. Samples of unfilled subject requests were collected to determine the types of

requests not being filled.

In addition to cultivating relationships with other information providers, Reference and Loan Library staff took steps to improve communication with their customers. A section of the library's web page was devoted to reference services. Descriptions of procedures for handling specific types of reference requests—such as medical and legal requests—were published at this website. Direct service for rush requests was offered to staff at public library systems when information was needed on short notice or when a database search was identified as the best resource available. Reference staff also provided telephone consultation to system reference staff needing advice on how to handle specific requests. Direct service also was offered to K-12 school personnel seeking information on educational policy and research.

A customer satisfaction survey was drafted and sent to local library users during spring of 1998 to determine how the information supplied by the Reference and Loan Library is used and whether materials supplied are meeting users' needs.

As online reference sources geared to end-user searching become more available to the public, Reference and Loan Library staff will continue to explore electronic resources—such as DIALOG—geared to sophisticated searchers and covering highly specialized technical areas. While the numbers of requests coming into the library are declining, the subject matter of the requests is becoming more complex, so staff will continue to use their expertise to provide information from databases that may not be available at the local or system level. Staff also will investigate initiating a reciprocal reference service agreement with MINITEX, Minnesota's state-level reference and interlibrary loan service, to share state-level expertise and resources beyond Wisconsin.

Staff who work with state government documents will explore with other state-level documents depository library staff the various methods for making electronic documents accessible to library users and the general public.

Statewide delivery services

The DLCL has been using LSCA funds to demonstrate intersystem delivery services in selected areas of the state since 1991. In 1995-96, the South Central Library System received additional LSTA funding to add the resource libraries in three additional systems and a number of academic libraries to the delivery route. This meant that all systems except Northern Waters Library system were at least partially included in the statewide delivery service program. There were still some inequities in the service, however, in that all systems did not have a minimum of three-day-per-week delivery (some only stop at libraries once a week) and some local libraries still had no van delivery between the library and the system.

To assess these inequities, the DLCL appointed a Delivery Service Committee in 1996 to further outline how delivery services could be improved and to develop a Request for Proposal to hire a consultant to gather information about the current status of delivery services and develop models for service delivery and cost sharing. In 1997, the DLCL hired Ruth Bessant who worked with the committee, gathered information from Wisconsin and other states, and issued a report on her findings. The report was published in September 1997, and Bessant made presentations to a variety of groups about the findings of the study.

In 1998-1999, the DLCL intends to award a grant to the Northern Waters Library Service to demonstrate and evaluate the impact of providing a van delivery service to that area. In addition, the DLCL intends to appoint an advisory committee to develop suggested guidelines for system delivery services, develop models for cost sharing of the intersystem delivery service, and evaluate the results of the grant awarded to Northern Waters Library Service.

State agency and Reference and Loan Library online catalog and circulation system

The Reference and Loan Library worked with library staff in four agencies (Departments of Public Instruction, Health and Family Services, Workforce Development, and the Public Service Commission) to plan and implement an online catalog/circulation system for these agencies. This shared catalog will allow library staff in the agency to see what each agency has, to place holds on library materials, and to further facilitate interlibrary loan among the agencies.

Newsline for the blind

Beginning in 1998, the Reference and Loan Library worked with the Regional Library for the Blind and Physically Handicapped to provide access to the National Federation of the Blind (NFB) *Newsline* service. This service allows blind individuals to dial into a server and listen to the three national newspapers being read by an electronic voice. The newspaper text is digitized each day by the NFB and downloaded to servers in Madison and Milwaukee. In the future, the DLCL would like to add local newspapers from Madison and Milwaukee and to add an 800 line so that the service can be used by blind residents throughout the state.

Combined school public libraries

The DLCL staff worked with the Council on Libraries and Network Development (COLAND) to revise the publication

Combined School & Public Libraries: Guidelines for Decision Making. The new publication was distributed in 1998, and is available on the division's website.

DPI and DLCL websites

The DPI and the DLCL dramatically increased the amount of information available to all types of libraries on the websites, including creation of the BadgerLink page that consolidates access to full-text information, WISCAT, government information, additional information on library technology, and links to other websites.

Related DLCL publications:

Creating a Shared Vision for Library Systems in Wisconsin: A Report On the Listening and Learning Meetings, Wisconsin DPI of Public Instruction, 1995.

Delivery of Library Materials in Wisconsin, Wisconsin DPI of Public Instruction, 1997.

Designing Schools to Accommodate Technology, DPI of Public Instruction, 1996.

Instructional Telecommunications: A Resource and Planning Guide, Wisconsin DPI of Public Instruction, 1995.

Internet Policy Statement and Plan, Wisconsin DPI of Public Instruction, September, 1994.

Legislative Proposal from the DLCL for Library Services for Multitype Library Cooperation at the System Level, Wisconsin DPI of Public Instruction, February, 1990.

Library Services and Technology Act, LSTA Information and Guidelines for Wisconsin, 1999, Wisconsin DPI of Public Instruction, 1998.

Library Services and Technology Act Plan for Wisconsin 1997-2002, Wisconsin DPI of Public Instruction, 1997.

Multitype Library Cooperation at the Area/State Level in Wisconsin: A Report Issued by the Council on Library and Network Development to the State Superintendent of Public Instruction, Wisconsin DPI of Public Instruction, February, 1990.

Reference Services in Wisconsin Libraries, Focus Group Summary, Wisconsin DPI of Public Instruction, 1994.

Report of the Interlibrary Loan Task Force, Wisconsin DPI of Public Instruction, 1996.

Report of the WISCAT Task Force, Wisconsin DPI of Public Instruction, 1993.

Technology Literacy Challenge Fund, Fiscal Year 1998 Application Guidelines, Wisconsin DPI of Public Instruction, 1998.

Wisconsin Educational Technology Plan PK-12, DPI of Public Instruction, 1996.

Wisconsin Interlibrary Loan Guidelines, 1996, Wisconsin DPI of Public Instruction, 1996.

Wisconsin's Model Academic Standards for Information and Technology Literacy, DPI of Public Instruction, 1998. ∎

COLAND*—from page 1*

positions held by those interested in libraries and information services. Members serve three year terms. COLAND, in meeting six times a year, sets forth a varied agenda including promoting cooperation and resource sharing, planning and setting priorities for the development of networks, providing input on state and federal legislation, and advising the DPI on policies, publications, and products. The Council is attached to the DPI Division for Libraries and Community Learning and welcomes members of the library community and general public to its meetings. Attendees are given ample opportunity to address items of concern to the library community.

The DPI is required to provide a biennial report to COLAND on interlibrary loan cooperation and resource sharing. The DLCL has completed and submitted to the Council the latest agency report. The Council will hold a public hearing on its content at the November 13th meeting. This hearing will be held at the Sheraton Hotel, 706 John Nolen Drive, Madison, and commence at 9:30 a.m. As a special feature in this issue of Channel we have included this report, not only for your information but also as a focal point of possible feedback to COLAND.

The Council, in its endeavor to better communicate with the public it serves, will soon have a web page through which agendas, meeting minutes, and membership contacts can be accessed at http://www.dpi.state.wi.us/dlcl/coland. ∎

Stumper involves dog in tree
Genealogy pamphlet not available, being revised

There is a correction needed for an article on genealogy material published on pages 13-15 of the September 1998 issue of *Channel*.

The pamphlet entitled *Genealogical Research; An Introduction To The Resources Of The State Historical Society of Wisconsin* is now out of print. This pamphlet is currently being revised and it is hoped that a new edition will be available in 1999.

The correct telephone number for the reference staff at the State Historical Society Library is (608) 264-6535.

Stumpers

A library patron from Marinette read a children's book in the 1960s about a dog who lived in a tree. All the other dogs ridiculed him until a flood made them change their minds. The patron would like to reread the book, but needs help locating the author and title. Resources checked by the Reference and Loan Library staff include The Cooperative Children's Book Center and the Internet.

A Janesville Public Library patron

who is writing a book is trying to identify a Wisconsin or Illinois governor who read the comics on Sunday morning television during the 1950s. This definitely is **NOT** Mayor Fiorello La Guardia of New York who read comics on the radio during a newspaper strike. Reference and Loan Library staff have already contacted the Wisconsin Legislative Reference Bureau; Wisconsin State Historical Society Library; and several

Wisconsin residents recommended for their knowledge of this time period.

Anyone who can give assistance with these stumpers is asked to contact Mary Struckmeyer at (608) 224-6168 or via electronic mail at strucme@mail.state.wi.us. Those using e-mail are reminded to include their full names in the text of the message, since it does not always come through in the header. ∎∎

Special Issue of Channel

This issue of Channel deals almost entirely with the Department of Public Instruction's report on interlibrary loan cooperation and resource sharing, which is required each biennium. This report focuses primarily on the activities of the Division for Libraries and Community Learning in the previous and the current biennium relative to the State Superintendent's responsibilities to promote library cooperation and resource sharing.

In order to get the material to subscribers before the scheduled Nov. 13, 1998, public hearing, and before the editor begins a four-week paternity leave, the November issue is only eight pages.

Because of the editor's leave, the December issue will be mailed later than is normal for the monthly publication. ∎∎

Printed on recycled paper.