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A Case Study Of One IT Regional Library Consortium: VALE–Virtual Academic Library Environment

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EXECUTIVE SUMMARY

Historic models of library management are being tested and modified in the digital age because of several interrelated factors. First, the importance of place or a home library space changes as electronic opportunities for dispersal of library collections increase with IT innovations and availability. Second, the high cost of IT has made library managers more sensitive to issues of cost in general while the ability of IT systems to provide easy access to managerial data, data previously difficult to capture, has allowed library managers to begin to differentiate costs for services based on use. As a result of these two factors, new, partially cost-focused models for delivering IT systems and information sources to library users are being developed. The new IT library regional models raise many questions about appropriate organizational and funding strategies. In this case, one strategy is examined in depth. Suggestions for alternative managerial strategies and economic models for IT regional library managers to pursue are given, based on the lessons to be gleaned from this experience and an examination of the literature describing other regional IT digital library ventures.

BACKGROUND

Today libraries are being challenged to develop digital library services, utilizing all the best information technology (IT) has to offer. These same institutions are also facing escalating costs for subscriptions to journals and indexes. Over the years, many librarians have chosen to form voluntary associations or consortiums. The majority of these ventures state as their goal the improvement of library services to users of each member library. In the past, the ability of individual libraries to pay the full costs of their use of the service being offered was not the primary issue library managers faced when building the association. It was common practice for wealthier libraries to cover the majority of the costs. Costs were not systematically reviewed, and decisions to subsidize some members were based on sentiments that favored inclusive, egalitarian models of service. This case centers on the work done by IT library professionals in New Jersey to develop a cooperative program for the digital

distribution of information resources. VALE is an acronym for the phrase selected to describe the goal of the new New Jersey consortium—Virtual Academic Library Environment (VALE, 2001). As a not-for-profit library regional cooperative venture, VALE exists to provide electronic databases and journals to its members, a large group of academic libraries in New Jersey. It has been in existence for almost five years, and it is an example of a collaborative organizational approach to the provision of information technology-based services in more than one library.

Data Sources for Case Materials

In building this case we reviewed all VALE public records, including minutes of meetings of the 28 member VALE Task Force held since June 1997. An Executive Committee with nine members is responsible for ongoing operation and growth of VALE, including budgetary accountability and planning for future funding. Accordingly, we also examined the minutes of their meetings held between December 1998 and November 2000. Two key members of the VALE leadership team were interviewed at length. The head of the VALE Executive Committee met with us for two hours. A leading member of the Task Force, one of the individuals responsible for introducing the idea to the state, who is also the person who has been the volunteer manager/business agent for VALE, met with us for over four hours. In addition to participating in the interviews, both of these individuals have regularly responded to requests for additional information or clarification of a source document. Each has also been willing to speak off the record about issues surrounding VALE's future. We have been in regular contact with both individuals since our initial meetings in November 1999 in preparation for a paper on value-added measurement perspectives available to libraries, especially libraries with significant IT investments. The study yielded evidence to show the applicability of three business models to the VALE project. They are Stakeholder Theory, Value-Added Model and Managerial Accounting. That paper was presented at the IRMA Conference in Anchorage in May 2000 (Taylor & Coughlin, 2000).

Issues in Consortium Formation

Agencies like VALE are being formed in many different states at this time, and the issues surrounding the formation, continuation and growth of IT library regional cooperatives are issues of significance to the future of all IT-based library services. IT regional digital library initiatives are often described as significant opportunities for the provision of innovative library services. However, it can be argued that the real significance of many collaborative IT library ventures lies in the transformation of each individual member library's funding structure. If more than one library can share a subscription because its digital nature allows for disparate locations, all the old patterns of funding libraries can be challenged. When economic realities demand that each library in the consortium pay based on its use of the subscription, all the older models of altruistic library cooperation are also challenged. These issues are often bypassed because IT library managers tend to focus their attention on the technical problems of building systems. In many cases, including VALE, the initial challenges for the regional library IT agency are perceived by the founders to be primarily challenges of structure, infrastructure needs for hardware, software, installation and training and funding, especially post-grant funds or matching fund formulation. From the start of a project, decisions about membership status and rights of the individual member institutions are present as issues of selectivity. Decisions must be made about whether participants must all do the same things to the same degree and at the same price. The development of VALE is illustrative of one-way management, and economic issues are handled when the goal is finding a way to offer new digital library services in a constrained funding environment.

When libraries enter the digital library age, there are many changes in the way users receive information. These have been studied by experts such as Michael Buckland, who calls for using technology to encourage a radical re-centering of libraries towards users (Buckland, 1992). In the past libraries, like their universities, have focused on inputs. Today the focus is on other stakeholders. The end users perception of value received is often the cornerstone of an outcomes assessment to judge

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