

**The Following message was sent by Ann Rutherford on August 6, 2007 at 12:22 PM**

You said to list 10 items that were important, but I found that many were linked to each other. As you can see, my mind does not think the same way as many of those there □ I hope this makes some sense and that it is helpful in some small way.

Fulfillment Task Force Musings

On my way home, I thought about all that we discussed Friday.

1. We know we have a broken system with no possible way to 'fix' it.
2. Librarians realize that we cannot replicate every library.
3. The larger libraries are able to keep up with their users; smaller libraries depend upon ILL or something like that in order to provide "equal access" to their users.
4. Some larger libraries can 'only' serve their communities as Bill reported. The consensus was that if a library could not lend/borrow; there seemed to be consensus that they could make that choice and they did not need to feel guilty about it.
5. We said we would not try to reinvent the wheel. (2 a)
6. The 'wheel' that other states already 'have' is a 'courier/delivery system' and as Bill pointed out the possibilities of a State Library Card. (4 d) The research sent out before the meeting, and Bills information indicate that both ideas are cost effective. (7 a, b, c) (see attachments as well)
7. We cannot make a determination about a courier/delivery system unless we have figures from 'curriers/delivery systems' that are available in our state. (7 a, b, c)
8. As Honore said, "we need to reallocate the ILL funds (the broken wheel) to a new system (courier/delivery system)' that might fulfill the need. (3 a) (7 a, b, c) (8 a, b, c)
9. Need of the committee to help draft legislation to reallocate the ILL funds (broken wheel) to a courier/delivery system (new wheel). (3 a) (4 a, b, c) (6 a) (7 a, b, c)
  - a. Bill stated that 70% of Montana's population lives along I-90 and I-94. It seems to me that we might be able to reach 15% of the population across the hi-line = about 85%. (8 a, b, c)
  - b. If we had an approximate cost of the 'new system,' and we determined the amount those libraries currently use that represent the last 15%, we could then protect that amount (15% of the ILL current funds or whatever is reasonable) for those unable to use the courier/delivery system. (5 a) We would then use the rest of the ILL money to 'begin' the 'new system' (courier/delivery system). (8 a, b, c)
10. As the state has 'never' covered the full cost of ILL, it would seem to me that they would not assume to cover the full cost of the 'new system.' However, the state could use the rest of the ILL funds to 'support' the new system and they could find a way to 'pro-rate' the rest for those libraries that wanted to participate (fairness). (1 a and b) (3 a) (4 a, b, c) (7 a, b, c) (8 a, b, c)
  - a. Looking over the research sent prior to the meeting, it appears to me that the 'new systems' (courier/delivery system) look at 'bundling' their service and there seems to be a significant savings. (see attachments – Michigan and Colorado)
  - b. All libraries involved with ILL have had to pay some of the cost, so paying some of the cost of a courier/delivery system would not be any different.
    - i. We in Miles City have looked into finding a solution as a federation to accommodate/enable those out of the way libraries to receive materials w/a local entity. (5 a) (8 a, b, c)

I believe the above addresses:

1. \$
  - a. Collective ways of paying/money
  - b. Reality check of MSL's ability to provide funding
2. Collaboration
  - a. Don't reinvent Wheel – join cooperative efforts regionally

3. Communication
  - a. Continue promote sharing
4. Delivery
  - a. Combine courier opportunities with regions
  - b. Currier system statewide
  - c. Fulfillment to areas of state where the mail system is only system they have
  - d. State library card
5. Inclusive
  - a. How can small one person library play as well as large library
6. Legal
  - a. Legislation
7. Planning
  - a. Focus on now and future
  - b. Increase commonalities – standardize systems (transport)
  - c. Service up cost down strategy
8. User
  - a. Defining how important moving of materials is – broader picture of circulation
  - b. Focus on end user
  - c. Mission of MSL and how fits with every citizen is equal

Attached was a pdf file entitled cost new wheel which you will find at this website.

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**The following email was sent by Beth Boyson on August 18, 2007 at 11:48 am:**

Dear members of the Montana State Library Fulmillment Task Force,

Greetings from Bozeman. I'm writing to you regarding the ASLD/PLD retreat at Chico Hot Springs, October 14 & 15, 2007.

We are having a program - here is the description: Title of presentation - The future of ILL: A Discussion. A 'retreat' suggests making plans and setting goals. All attendees are asked to participate in an informal, non-binding, congenial, extempore, unofficial, spontaneous, open, frank, free, and entraining discussion of the inter-library loan system in Montana. Where is it going? What do other states do? Why do we do it the way we do it? And what do YOU think about it?

Moderated by Beth Boyson, Bozeman Public Library

We agreed to do this program before I knew about the Task Force! Mary Guthmiller and I were gabbing and she mentioned it to me, thank goodness.

I'm writing to:

a) invite you to the retreat to participate in this 60 minute program, and we could also introduce you as Task Force members

2) seek ideas about how to frame this discussion

III) ask if there is anything we could do at this retreat to help the Task Force.

I'm planning to present some ideas about what neighboring states do and other states with mega-programs, too. Then ask people, 'what do you think?' There is no right or wrong answer, there are not titles here (Director or Librarian) just library staff discussing a program that all of us have ideas and perceptions about. In an ideal world, some of the discussion would change perceptions and ideas. Also, we hope to present such a program annually at the retreat on different library issues. (!!!)

Any assistance is much appreciated.

Thank You! Sincerely, Beth Boyson

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**The following message was sent by Ann Rutherford on August 22, 2007 at 1:05 pm:**

This is some great information, and contains wheels we wouldn't have to reinvent ;) just me, ann

Hi all,

Attached is a list of the courier services we've identified on the moving mountain project web page. <http://www.clicweb.org/movingmountains/> If you're not on the list, please send me your link information.

Also, we have a lot of great information on our site – but we could use a lot more. Please send us your RFP, PR materials, training stuff, studies, assessment tools – we need more content.

Thanks, Valerie

Colorado Library Consortium – Resource Sharing  
[http://www.clicweb.org/resource\\_sharing/index.php](http://www.clicweb.org/resource_sharing/index.php)

Interlibrary Delivery Service of Pennsylvania  
<http://www.bucksiu.org/libraries/ids/>

Kansas City Metropolitan Library & Information Network's Courier Service - KCMLIN  
<http://www.kcmlin.org/>

Kentucky Virtual Library  
<http://www.kyvl.org/html/about/docdel.shtml>

Lanter Delivery System Agreement (12 universities in Illinois, Indiana, Iowa, Michigan, Ohio, Pennsylvania, Wisconsin)  
<http://www.cic.uiuc.edu/groups/InterlibraryLoanDirectors/archive/ResourceList/LanterDeliverySystemAgreement.shtml>

MeL Delivery Service (Michigan)  
[http://www.mlcnet.org/cms/sitem.cfm/library\\_tools/mel\\_delivery/](http://www.mlcnet.org/cms/sitem.cfm/library_tools/mel_delivery/)

Metropolitan New York Library Council (METRO)  
<http://www.metro.org/content/view/43/231/>

MINITEX (Minnesota, North Dakota, and South Dakota)  
<http://www.minitex.umn.edu/delivery/>

NEKLS - Northeast Kansas Library System  
<http://www.nekls.org/services/nexpress.html>

Northeast Massachusetts Regional Library System – Delivery Service Information  
<http://www.nmrsls.org/delivery/>

OhioLink  
<http://www.ohiolink.edu/ostaff/circ/>

Orbis Cascade Alliance (Washington, Oregon, Idaho)  
<http://www.orbiscascade.org/courier/index.htm>

RI Office of Library and Information Services  
<http://www.olis.ri.gov/network/delivery/index.php>

South Central Library System – Delivery Service  
<http://www.sclsdelivery.info/>

Southern Ontario Library Service – Delivery Information  
<http://www.sols.org/resourcesharing/delivery/index.htm>

SWON Libraries - Southwest Ohio and Neighboring  
<http://www.swonlibraries.org/member-docs>

Trans-Amigos Express (TAE) - currently operates in Texas, New Mexico, Arkansas, and Oklahoma, and expects to expand service to Arizona  
<http://www.amigos.org/?q=node/237>

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**The following message was sent by Bill Cochran on August 22, 2007 at 3:49 pm**

Attached are the notes from which I referred during our meeting earlier this month, but didn't think to bring copies to share.

Also, I wanted to follow up on Bruce Newell's search during the meeting for the holdings of our library and the Montana Shared Catalog on the subjects of 'sailing' and 'canoes', which he reported to be zero in our case and two for the state. A keyword search for sailing in our catalog produces 174 hits, with many being irrelevant as appearing in fiction titles, etc., but there are at least 22 that are non-fiction titles on history, navigation, beginning through advanced techniques, rules and other aspects of sailing, for all reading levels. A keyword search on canoes produces 60 hits, with at least 26 being non-fiction titles on how to build and use canoes, including guidebooks for specific waters in Montana and elsewhere and the canoeing books of Alan Kesselheim of Bozeman. As I suggested to Bruce during the meeting, his results must have been the product of esoteric subject heading terms, rather than a reflection of actual holdings.

I'm looking forward to seeing the results of our 'Top Ten' ranking exercise and will see you at our next meeting.

Bill

Notes for Fulfillment Task Force Meeting  
Helena, MT August 3, 2007

Parmly Billings Library

- 17 year circulation total since I began in Billings through FY07 is 11,347,083, of which 13,040 were borrowed in-state, or .1 of 1%. During the same time period, we loaned 56,857 in-state, about .5 of 1%, making us a little more than a 4:1 net lender over the entire 17 years.

- Our fill rate from inventory and purchasing items in FY06 was 99.93%, with .7 of 1% filled by both in- and out-state ILL.
- Our service jurisdiction has 1/8 of the population of the state, but we provided 1/6 of the state's total public library circulation, with only 1/12 of the state's public library FTE staffing, in FY06.
- All State assistance we have budgeted to receive in FY08, including direct aid, coal severance, and ILL reimbursement, a total of \$15,095, will represent a total of .5 of 1% of our budget.
- In FY97, when we lent more than a third of all public library ILL loans in the state and were a 5:1 net lender, we received \$45,705 in ILL reimbursement alone.
- We were the largest public library ILL lender in the state through FY00 when we were still the largest lender by a 2:1 margin over the next closest public library: this was two years after we had dropped online OCLC ILL service, after having been the first public library in the state to sign up for the service.
- We average pulling 85 items a day from our shelves to fill holds placed on our system by our own cardholders, representing about three hours of staff time for a daily cost of over \$60.00 and an annual cost of \$16,000.
- We average about 15% of both holds from our own collection and ILL items not picked up before they have to be returned to the lending library.
- The 42,216 A/V items we owned in FY06 represented 20% of the total state public library holdings of 214,717.
- Although our FY06 items per capita of 2.45 was slightly below our public library size category average of 2.50 and a full third below the statewide average for all public libraries, our turn rate of 3.01 was significantly higher than the 2.69 for our size category and almost double the 1.68 for all public libraries.

#### Montana

- The State of Montana provided 2.3% of public library funding in FY06, with the remaining 97.7% provided by local taxes or other sources.
- In- and out-state ILL represented 2.9% of all public library circulations in FY06, with the remaining 97.1% filled from local collections or purchase.

#### Other

- Testimony on Section 108 of the Copyright Law submitted to Congress by ALA and ARL on February 7, 2007 includes the following statement:

Interlibrary loan is, by definition, a mediated activity in that library staff or systems screen requests from users before fulfilling them. Most libraries prefer to mediate these transactions (rather than allow the user of the borrowing library to contact the lending library directly) because frequently the user does not realize that the borrowing library already owns or licenses the material being requested.

- Wisconsin's WISCAT statewide shared catalog has had the ability to offer unmediated ILL for several years. A 2004 pilot project offered advanced training in using the system to public library identified heavy users of ILL; although all of the directors in the study were glad the functionality was available, none planned to offer it due to significant errors and abuses even by the trained patrons. To date, not a single public library in the state offers unmediated ILL.
- WISCAT, and perhaps other state shared catalogs, do offer patron-initiated, but mediated ILL, to reduce the staffing costs and speed up the ILL process, without abandoning the ability to screen requests for the reasons identified in the ALA/ARL testimony and experienced in the WISCAT pilot project.
- In 2004, ARL estimated an average unit cost of an ILL to be \$26.77.
- In FY06, while the Iowa Access Plus interlibrary loan reimbursement program supported only 259,497 ILL loans at a per transaction reimbursement of \$1.47 and total cost of \$382,604, the Open Access statewide library card program supported 3,606,345 walk-in loans at a per transaction reimbursement of \$.30 and total cost of \$1,094,376. The statewide library card supports almost 14 times more circulation than the ILL program, with significant savings to the state and the participating libraries, because the patrons underwrite the transportation costs of most of the activity.
- A 2004 study of the Connecticut non-resident reimbursement program estimated a statewide savings of \$30 million for its similar program supporting walk-in service over interlibrary loan.
- The Maine State Library currently contracts with a courier to provide delivery of ILL materials at rates ranging from \$598 per year for one stop per week to \$2,990 per year for five stops per week; this charge is paid whether the participating library has any materials for pickup or delivery.

Bill Cochran, Director, Parmly Billings Library

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**The following message was sent by Bruce Newell on August 22, 2007 at 6:40 pm:**

Thanks for following up on my "sailing canoes" search. While I appreciate your research, actually, I was specifically looking for "sailing canoes", not Boolean sailing OR canoes. "Sailing canoes" is an obscure topic, admittedly, one which would have been less obscure 120 years ago when they were popular, and if we could have searched our online catalogs then. And I am building a sailing canoe, so I have a real interest in what's been written about this topic. Admittedly, this is a limited search strategy, but one that does (thankfully) not garner books on canoes, or books on sailing, both fascinating topics but having very little to do with sailing canoes. To recap:

- a) In the Parmly catalog, a keyword search for "sailing canoes" yields no hits
- b) Ditto the Lewis and Clark Library (Parmly is not unique in not having books on this very pointy-headed topic)
- c) The Partner libraries in the Montana Shared Catalog yielded one, tangential hit. The entire Montana Shared Catalog yielded two hits, two tangential hits  
MLNCAT yielded one tangential hit (interesting, that it did not yield two)

d) WorldCat yielded 16 hits (following). When I look at this larger but still very limited list, my interest perks up at 6,8,9,15, and 16--five items out of a list of sixteen. This makes my point, I think, about the deeper the pool, the longer the species list.

I continued my search by looking at Amazon.com, which yielded 539 results. Interestingly, since many of these hits come from whole-book indexing, there are snippets here and there in sailing books (example: "... Fenger toured the Caribbean in the 17-foot, two-masted sailing canoe YAKA BOO. He thought a rudder to be unnecessarily complicated ...") but by in large while there were many hits, there were likewise many misses.

Google Book Search found 679 books, and while I didn't look through the whole list, the results appear similar to those from Amazon.com.

An open Web search in Google retrieves 38,300 hits, many of which are quite good and link e-books and magazine articles of interest.

So, that's the whole story, from my point of view, a users point of view. Sadly you are incorrect (I wish there were more books on this topic), and my results were not (in your words "the product of esoteric subject heading terms, rather than a reflection of actual holdings." There's just not much written (in books) about this topic, nor many holdings in libraries. But there are some good books out there, and some are in libraries. This illustrates, rather nicely, the importance of giving users the biggest pool possible to find materials they are interested in. Ranganathan was right, there is the perfect book out there even for the most pointy-headed user, as librarians we just need to provide users with access to finding what they are looking for, and getting it--hassle-free.

WorldCat hits:

1. Wayfinders a Pacific odyssey
2. Vaka moana : voyages of the ancestors : the discovery and settlement of the Pacific
3. Vaka moana : voyages of the ancestors : the discovery and settlement of the Pacific
4. Traditional sailing canoes in Lau = Na camakau mai na yatu Lau
5. Seafaring in the contemporary Pacific islands : studies in continuity and change
6. Sailing canoes : a brief history together with an outline of types, classes, designs, specifications and rules.
7. Sailing canoes a brief history together with an outline of types, classes, designs specifications and rules.
8. Sailing and canoeing
9. Rushton's portable sporting boats, sailing canoes, single handed cruisers, barnegat sneak boats and steam launches for hunting, fishing, trapping, pleasure rowing and sailing.
10. Rushton's portable sporting boats, sailing canoes, single handed cruisers, barnegat sneak boats and steam launchers : for hunting, fishing, trapping, pleasure rowing & sailing
11. Rushton's portable sporting boats, sailing canoes and barnegat sneak boats : for hunting, fishing, trapping, pleasure rowing and sailing
12. The Question of Pre-Columbian Carib Sailing Canoes

13. *Novi Belgii novaeque Angliae nec non partis Virginiae tabula multis in locis*

14. *From Buckfast to Borneo : essays presented to Father Robert Nicholl on the 85th anniversary of his birth, 27 March 1995*

15. *Building outrigger sailing canoes : modern construction methods for three fast, beautiful boats*

16. *The boat sailer's manual : a complete treatise on the management of sailing boats of all kinds, and under all conditions of weather, containing also concise descriptions of the various rigs in general use, at home and abroad, directions for handling sailing canoes, and the 'rudiments of cutter and sloop sailing'*

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**The following message was sent by Bill Cochran on August 23, 2007 at 4:37 pm:**

Why didn't you say so?

As I suspect like everyone else in the room, I understood you to be interested in 'sailing' or 'canoes', rather than 'sailing canoes', a subject so esoteric that, as you note, very little on it in book form has ever been published, it is not a subject heading in either LC or Sears and, as you have demonstrated, it is therefore unlikely to show up in even the largest library catalog in the world, WorldCat, much less that of any library in Montana. In fact, if you take out the duplicates or editions represented by your list items 3, 7, 10 and 11, and 13, which is a Dutch map of New England published in Amsterdam in 1685, WorldCat identifies only 11 items in all the libraries of the world related to your subject.

I have good news, however. Even though no library catalog search will get us to them, including WorldCat, we have four books here at Parmly Billings Library that can help you and would be on the shelf here if you were one of our customers and are available for ILL. *The Stripper's Guide to Canoe-building* by David Hazen (Larkspur CA: Tamal Vista Publications, 1999) includes six full-size template drawings and instructions for building seven different canoes plus a whole chapter, with plans and a bibliography, on how to add and use a sail. Chapter IX of *Boat-Building and Boating* by the venerable Dan Beard (Kingston WA: Dixon-Price Publishing, 2001; reprint of 1911 Scribner's ed.) is likewise devoted to making and using sails on canoes. In the same vein of Pacific island sailing canoe lore as most of the hits on WorldCat, we have *The Voyaging Stars: Secrets of the Pacific Island Navigators* by David Lewis (New York: W.W. Norton & Co., 1978), which is full of illustrations and photos of sailing canoes and a great deal of info on how to navigate them. *Canoeecraft: An Illustrated Guide to Fine Woodstrip Construction*, rev. & esp. ed. by Ted Moore (Buffalo NY: Firefly Books, 2000) is an extremely thorough guide to canoe construction; although it does not include plans for sails, it does provide a list of sources of canoe sails and sail plans and a bibliography on sailing canoes.

That even the Mother of All Library Catalogs is so unhelpful at locating information of use to you, compared to its commercial, full-text searchable competitors Amazon and Google Book Search, supports my belief that the ultimate resolution of the goal of getting equal access to information to the most remote locations in Montana will be when most all of it is available and searchable digitally.

Given that the scope of our work is how best to share resources within the State of Montana, where our resources are poor, and where even when we do have them on esoteric subjects like sailing canoes, our catalogs will not reveal them to us, I think we have to be realistic about what the appropriate level of investment should be in developing systems to move around physical items that we're not sure meet our customers' needs.

Finally, as entertaining and revealing of substantive issues our dialogue has been, I'll hazard a guess that not all of our Task Force colleagues are hoping that it continues indefinitely. I propose that you get the last word, by reply to all to this message, and that we then declare a truce and take up our differing visions of the future when asked.

Take care, Bill Cochran, Director, Parmly Billings Library

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**The following message was sent from Bruce Newell on August 23, 2007 5:24 pm**

Sure, "truce" my friend. And we are in agreement regarding the limitations of any catalog, save perhaps a mash-up of WorldCat, Amazon, and Google Book Search to meet these kinds of esoteric demands. I have high hopes for an improvement on this front in the immediate future, however the current state of the art is pretty lame. And you are right, as well, regarding the lack of a Library of Congress Subject Heading to fit my bill; a better search uses a Boolean argument and the LC subject headings:

"canoes and canoeing" AND sailing

I found this out by looking at the subject headings used for several known-useful books in my personal collection. BTW, after playing with this last night, I found a number of titles that looked promising that I didn't know about before. Old dogs, new tricks.

Finally, to celebrate our agreement to agree, I attach a picture of the design I am building, zooming along at Mach 12. Well, maybe 10 knots.

Regards, Bruce