

To: Fulfillment Task Force Members
From: Ken Adams, Montana Shared Catalog Director
Date: November 14, 2007
Re: Information on the MSC Partners Group

Montana Shared Catalog “Partners Group”

What is the “Partners Group”?

“Partners” is a group of Montana libraries that share user privileges, materials and policies. Partner member libraries all adhere to “Best Practices”; a means by which all the libraries agree on policies and procedures to enhance a sharing system. Materials are freely shared within the Partners group utilizing a variety of delivery methods. Current Partners members are:

Bitterroot Public Library (Hamilton)
Drummond School and Community Library
Flathead County Library (Kalispell, Whitefish, Columbia Falls, Marion, Bigfork)
Glendive Public Library
Hearst Free Library (Anaconda)
Miles City Public Library
Miles Community College Library
Mineral County Public Library
Missoula Public Library (Missoula, Swan Valley, Seeley Lake, Frenchtown)
North Valley Public Library (Stevensville)
Polson City Library

How do Partner Libraries “share” materials?

Using the MSC’s integrated library system, patrons or library staff within a Partner library can place holds on an item from *any* Partner library collection. If the item is available, the “lending” Partner library will collect the item from the shelf, place it in transit and add it to the shipping crate for delivery. If the item is unavailable, the patron hold becomes part of the queue for that title. As soon as that title is available in *any* Partner library, it is routed to that patron’s library. In essence, holds are placed on items, not specific libraries, thus making patrons eligible for the next available copy at any Partner library. Within the system there are more copies of a title available for circulation thus satisfying patrons faster than traditional hold systems.

Libraries do have the discretion *not* to include specific parts of their collection that they do not wish to circulate for example, a local valuable history collection, signed editions, reference material, etc.

How do items circulate?

Circulation for Partner libraries is 28 day checkout, with the option of up to 2 renewals unless there are holds for that item. New items have the option of a limited 10 day checkout with the option of up to 2 renewals unless there are holds on that item. The reason for this policy is to have consistency for all staff and patrons.

When a Partner item is returned to *any* Partner library, it is checked in and a transit slip is automatically generated letting the circulation staff know where that item needs to be sent. The item is either placed in a crate to be returned to its owning library, or it becomes part of the Floating Collection (see below) and is shelved.

What is “Floating” circulation?

Partner libraries have the option of allowing parts of their collection to “Float”. This means that when a patron returns a “Floating” item to the library and there is no existing hold for that item, the item remains a part of that library’s collection and is shelved (either with like items, or in a special floating section). The item remains in this library until it: A) requested by another library/patron, B) in the borrowing library for 6 months and is automatically routed back to its owning library, or C) manually requested back by its owning library. This allows libraries the opportunity to circulate items that they have not been able to purchase. In this scenario, a library’s old items may well become *new* items in another library’s collection. Floating collections can make a libraries holdings more diverse.

How do Partner Libraries move items around the State?

Partners use a variety of courier options. The Eastern part of the state uses the daily Rimrock Stages bus line to transport crates from Glendive and Miles City to the Western libraries. Cost for each crate is \$5 for 50 pounds of items. The Eastern libraries receive crates from the Western libraries in the same manner. Items are then checked in and re-shelved, or routed to patron holds or back to the owning library.

Polson is centrally located between Missoula and Kalispell on the scheduled bus route with Rimrock Stages. Partner materials travel by crate via the bus to these two destinations usually on a daily basis ~ sometimes every other day. Items for the Bitterroot (Hamilton and Stevensville), Glendive, Miles City, and Mineral County are grouped together, marked, and added to the Missoula crates for re-routing at the MPL hub. The postal service is used for Anaconda and Drummond items as this is lower in volume at the present time.

Missoula Public Library (MPL) serves as the hub for approximately 80% of Partner deliveries in Western Montana. MPL sends anywhere from five to eight crates daily to Flathead County. As stated above, the bus system charges \$5 per crate; however MPL also pays \$3 per crate for local courier delivery to the bus depot, for a total cost of \$8 per crate. Because of this expense, Missoula has asked many (in particular the larger) Partner libraries to send Flathead items directly to Flathead County Libraries, rather than through Missoula. Libraries such as Bitterroot Public, North Valley Public and Mineral County end up paying postage to mail items directly from their libraries. It was recently learned Mineral County has had to deny numerous requests as they no longer have sufficient funds to mail materials. The Partners is currently exploring a means that will allow MPL to route materials to Flathead for these libraries at their expense thus reducing mailing costs.

Due to a terrific pricing system through a local delivery service, MPL serves as the hub for ALL Partner items heading to the Bitterroot Valley. Towne Mailer charges a set fee of \$7.50 per pick-up and delivery per library, regardless of how many crates are in a shipment.

An added note about staffing: As a direct result of the huge popularity of “Partners”, MPL has recently had to hire a 32 hr/week library assistant to process Partner materials, both incoming and outgoing. Getting this done with existing staff levels was no longer feasible without severely overburdening staff. On average, MPL processes 150-220 items a day to send to other libraries and 12-15 crates that are received from other libraries. Processing entails unloading, checking in, sorting, rerouting, prepping for the holds shelf and shelving onto the holds shelf.

Other means Partner libraries utilize to deliver materials include local delivery services, traveling volunteers, co-workers, post office drops, beer delivery trucks, and even hand-pulled wagons used to transport crates from the library to the bus depot. The Partners Group has reached a critical point in how much further it can expand membership and circulation. Funding, staffing and facilities issues must be addressed so that this innovative group can continue to grow and provide this invaluable service. Without a reliable, scheduled courier service it will be increasingly difficult to add libraries into this program.

How do the Partners communicate?

Partner members hold monthly conference calls to discuss successes, concerns, policy changes, and upgrades to library service. Partner libraries also keep in touch via discuss lists, email and phone on any specific issues that may arise in the day-to-day operation of Partners. This collaboration of many talented librarians makes a very strong Montana library system that has the needs of all libraries’ patrons as their primary focus.

What are the advantages of being a Partner member?

The number one advantage of being a Partner is having the ability to secure items for your patrons that you do not have as a part of your collection in a very timely and cost effective manner. Patrons in Partner libraries have the advantage of a federated search of over 665,000 items at their disposal. Since requested Partner items generally arrive in a few days, Partner materials are shared faster than traditional Inter-Library Loan. Faster service and larger variety of available materials increase patron satisfaction. New titles are also more readily available within the Partners system with more copies owned and circulating faster to satisfy the Partner level holds.

For smaller libraries, having access to the larger collections enhances rural service and item availability. With limited budgets, Partner service provides a substantial savings, with libraries being able to share collections. For example, library items such as DVDs and audio books can be very expensive to purchase. Borrowing these items from a Partner library saves money. Many Partner libraries attempt to compliment each other’s collections by not duplicating titles and directing purchasing dollars to other items or services that can benefit the library and its patrons.

Patrons benefit from the consistent circulation periods for the shared items. Wherever a patron checks out an item, the item goes out for the same period of time, based on the Partner circulation and user privilege parameters. Patrons can also pick up and drop off Partners items or pay fines at any Partners library. This makes things simple for the patron. The user is the focal point of Partners and their enthusiastic satisfaction can be heard in comments such as, "I get a chance to read things I wouldn't get to otherwise," "It broadens my reading horizons by having such a wide variety of items from which to choose," and, "We love it, it's the coolest thing!"

Partner service is more efficient and economical than traditional Inter-Library Loan - more items available, at an inexpensive rate, moving faster than the mail system, with consistent checkout and due dates all add up to patron satisfaction and a lower cost for Montana libraries.