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A Message from the State Librarian Interlibrary Loan in Montana

By: Darlene Staffeldt, Montana State Librarian

If interlibrary loan (ILL) is defined as the process of loaning library materials (returnable and non-returnable) between libraries to meet user needs, then Montana librarians have provided inter-library loans to their users as a basic library service since Montana libraries began in the late 1800s.

Montana interlibrary loans have evolved from being mainly librarian-initiated (or mediated) requests to becoming more patron-initiated (or non-mediated) requests. Interlibrary loan librarians used to employ tools such as the National Union Catalog and Pacific Northwest Bibliographic Center. Now, we utilize tools, such as OCLC's WorldCat and Montana's shared catalogs. To view more history of Montana's interlibrary loans, please see the table presented at: <http://msl.mt.gov/admin/ill/ILLHistory.pdf>

The State of Montana began to subsidize ILL between the state's libraries in 1990. The ILL program was one of four pieces of the Information Access for Montanans Act passed by the 1989 legislature. The other three pieces include: 1) state aid per capita per square mile for public libraries, 2) base grants for federation support, and 3) a statewide library card.

The ILL program administration was, and is, relatively simple. Loaning libraries supply an abbreviated list of loans to Montana State Library (MSL) annually; MSL reviews the loans and reimburses the library on a per-item basis. The per-item amount that is reimbursed is calculated by dividing the total amount appropriated (which was at \$300,000, but has been reduced, due to state budget cuts, to approximately \$175,000) by the total number of loans. Last year, Montana libraries received \$4.72 per item.

Currently, Montana's reimbursement system views each loan as equivalent. This stance recognizes that each patron's request is of equal value and that a library's work of providing the item is equal to another library's work. Our system is based on reciprocity.

A library that loans as many materials as it borrows has a reciprocal relationship with the system. However, when a library loans more than it borrows or the library borrows more than it loans, a reciprocal relationship vanishes. Because of the differences in library resources around the state, I believe that the relationships between Montana libraries regarding interlibrary loan are generally not reciprocal.

One way to build reciprocal relationships within a state having many have-nots and a few haves is to bolster the resources of the have-nots. I believe that MSL has attempted to do so for public libraries. We have supported demonstration projects that would consolidate poorly funded city libraries into less poorly funded countywide systems. The Commission advocated for a district law that would allow communities to form larger libraries with initial levy amounts set at establishment. The Commission, with invaluable assistance and leadership by the Networking Task Force (NTF) and the library community, also secured state funding for an electronic periodical database, thus enriching our state's information resources for all types of libraries as well as Montana's citizens.

Another way in which to build a more reciprocal ILL system is to recognize the importance of resource libraries to the State's citizens. A method to do so, quite simply, is to follow the lead of other states by recognizing that all loans are worthy of an equal subsidy, but that loans above the number which a library borrows represents an "extra" service by the local library. This belief would lead to a payment scheme that would pay a bonus for any net loan.

Assumptions:

- All Montana libraries are a vital link in resource sharing.
- Some Montana libraries share more items than do others.
- The nature of interlibrary loan is changing. Peer-to-peer resource sharing (as typically encouraged by shared catalogs), MLNCAT access to OCLC's World Cat, the advent of patron-initiated and non-mediated interlibrary loan requests, and the availability of on-line information have, and will continue to transform interlibrary loan.
- According to the ARL (Academic and Research Libraries) Bimonthly Report 236, dated October 2004, titled "Assessing ILL/DD (interlibrary loan/document delivery) Services: New Cost-Effective Alternative...user-initiated ILL/DD operations provide better service than mediated ILL/DD services. In most cases, user-initiated services have lower unit costs, higher fill rates, and faster turnaround times than mediated services."

It's clear we need to completely rethink ILL, which has undergone a fundamental change - from a mediated service for the few on special occasions to an unmediated routine service for the many whenever they need it. We need to completely rethink ILL because Montana citizens need access to more resources than those available at their libraries or that are available at no cost through the Internet.

All Montana Libraries, but perhaps especially the partner libraries of the Montana Shared Catalog, have been very successful as of late in providing good services to their library users. Montana patrons are finding what they want to read at their local libraries or via their local libraries at other Montana libraries. This wonderful success has put the interlibrary loan reimbursement program into a bit of a crisis. The fixed amount of money does not extend far enough to provide appropriate subsidy to all participating libraries as it has in the past.

At their June 2005 meeting, the Networking Task Force discussed and agreed upon the following consensus recommendations regarding ILL reimbursement:

- The whole idea is to get materials in patrons' hands.
- ILL is a critical, if grossly underfunded, part of good library service. We don't have enough money to make any Montana library happy.
- We need a transition strategy to make it possible for all Montana libraries to play between now and when we are able to adequately fund this process.
- We need to become more savvy marketers of resource sharing activities
- Libraries are part of a changing world. ILL is a tool based on a decades-old model, and is no longer the exclusive current paradigm. We need to create strategies responsive to current realities.

The Montana State Library Commission will examine the interlibrary loan reimbursement program at their August and October meetings. The State Library staff, with the help of the Networking Task Force and the Montana library community, will provide the Commission with the pros and cons of at least four options. These options include:

- the status quo;
- reimbursing net-lenders;
- reimbursing net-lenders with minimum thresholds;
- a 50/50 mix of reimbursing net-lenders and reimbursing everyone.

MSL staff will make a recommendation for a patch solution for the FY'2006 reimbursement program and will recommend further study, research, and discussion for a long-term fix or replacement of the reimbursement program. The long-term plan will include additional options, such as spending the money on something else, like OCLC costs, which encourages effective resource sharing on a statewide basis.

I encourage each of you to share your thoughts with me regarding the positives and negatives for your library for each of these options. Additionally, if you have other suggestions or options that we should consider, please bring those to my attention.