

**The following message was sent by Marsha Hinch on September 5, 2007 at 4:57 PM  
“along with Ann, some food for thought...”**

**Just a few preliminary thoughts on the Fulfillment Task Force:**

The purpose of the Montana Interlibrary Sharing Protocol is “to bring order, equity, and efficiency to interlibrary sharing practices among all libraries in the state of Montana, thereby providing Montana citizens maximum accessibility to the information that they require”.

Although it seems to be the general opinion that the Interlibrary sharing system is “broken”, I would suggest that the program has been extremely successful considering the increase in demand over the years. What I see as “broken” is the funding mechanism which has not kept pace with the demands on the program. While some of the techniques may need to be “tweaked” and appropriations evaluated, I don’t think we can risk losing the entire program in the name of better fulfillment for our patrons.

At his time, the main focus on “fixing” our ILL system seems to be the incorporation of a courier system. After visiting with Jim Heckel and Kathy Mora (GF Public) and listening to Bill Cochran and Honore Bray it appears that the actual delivery cost of the program is the lesser amount of the transaction. If in fact, it costs between \$18 and \$24 to process a book for ILL, the \$2 to \$2.50 an item for delivery would seem to be the least of our problems. I would suggest that we rearrange our priorities and focus more toward assisting the larger libraries with the processing expense and reimbursing the smaller libraries for postage rather than a courier system at this time. Just a note of interest, the Colorado Library Courier operates on \$800,000 to \$900,000 a year – half of which is paid by the state and the other half by the libraries.

The total MSL budget for the Library Development Department is \$2,415,394 of which ILL expense is approximately 8%. Maybe the redirection of funding toward this critical service should be considered.

It also seems that the costs to process the ILL requests are higher for the larger libraries that hire specific staff for the task than the smaller institutions that utilize regular staff. Possibly, the protocols need to reflect a change to encourage borrowers to first request from the smaller libraries who seem to be able to process more efficiently per item. It also might be appropriate for to impose maximum number of requests by any one patron at any one time.

Think Bill’s idea of a Montana State Library Card is excellent – especially if this would help the larger institutions while maintaining the service of getting items to patrons. Know the kinks could be worked out of this pretty easily – also keep in mind that the statues already allow for such a card.

As Darlene has stated, the strategic plan of MSL is to “...support the role of all Montana libraries in delivering quality library content and services to their patrons...” Have confidence that we can come to a positive conclusion that will enable us to continue to do just that.

---

**The following message was sent by Ann Rutherford on September 6, 2007 at 10:20 am:**

State Library Card

*“Jodi stated that she has a patron that checks out several VHS tapes from Missoula, and returns them to Drummond and wondered if this was the intent of “floating”. The group agreed it was OK and she could always send any tapes back to the owning library.”*

The above was part of the minutes of the 'Partner Group.' As you can see, it indicates that if we had a state library card, it would work as per example above.

I would also like to suggest that the next face-to-face meeting be held in a 'Partner' library. I would like you to see how this works and how it 'cuts down' on the time it takes to process a 'HOLD'. If we had a state library card, the user would place a HOLD on any Montana libraries material and 'if' we use a courier (which is what the partners do with the bus system) we do not have to 'address envelopes, and process each item individually," but rather place the item in a 'crate' and it is on its way. I realize this might be hard to visualize and therefore I am making this suggestion.

Yesterday my staff processed three ILL's (home delivery) items and it took 45 minutes. Today she processed three ILL (HOLDS) and it took 10 minutes, including taking them from the shelf, checking them out and placing them in a bag for delivery to our public library that will place them in the appropriate crate.

Thank you for your consideration.

Sincerely, Just me, ann

---

**The following message was sent by Bruce Newell on September 6, 2007 at 12:33pm:**

**Subject:** Re: Fulfillment Task Force

Thank you Marsha and Ann for sharing your thoughts. Here are a few of mine. I hope they contribute usefully to this healthy discussion.

Bruce

September 5, 2007

I thank Marsha and Ann for their thoughts regarding the Fulfillment Task Force. It's good to talk things over online like this. In particular, Marsha's September 4, 2007 paper "Just a few preliminary thoughts on the Fulfillment Task Force" brought to mind a discussion I had last month with my friend Stan Bradshaw, in regards to stream restoration in the Blackfoot River system. I think our July riverine discussion might inform our discussions regarding resource sharing. Stan works for Trout Unlimited, and has been an active participant in the Blackfoot Challenge for years.

Stan was driving my wife Sue and I along a recently and successfully restored North Fork of the Blackfoot tributary creek near Ovando, and mentioned that key to the creek's recent restoration were the adoption of comprehensive strategies which addressed all the water-use aspects of the stream, not just a piecemeal few. Moving beyond Band-Aid remediation to systemic restoration had brought water all the way from the creek's headwaters to where it now, and wonderfully, joined the North Fork for the first time in years. Stan related how in a stream everything is connected, so to restore a stream's health, all aspects of the stream's ill-health needed to be addressed in concert

Our Fulfillment Task Force has a similar challenge and opportunity. We are charged with improving a complicated system, of which interlibrary loan is an important but by no means the only part, and this multiple-part system's health can only improve with the application of coordinated and system-wide strategies.

To think clearly about this I need to break things down. I ask myself, “What are the parts and pieces of the fulfillment puzzle?”

First, it's all about getting knowledge resources (books, articles, films, music, et cetera) in our patrons' hands, quickly, conveniently, and at a cost our patrons and our libraries can afford. Our focus is properly on patron outcomes, not on library processes. For example, it doesn't matter if ILL is working smoothly, if this smooth functioning results in patrons obtaining but little utility from the fruits of librarians' labors. Our Task Force's strategies will almost certainly require rethinking many processes in Montana libraries, but can only be measured by these libraries' patrons' success.

Secondly, we need to acknowledge that our patrons live in an information culture no longer dominated by libraries. We could call this world (from our patrons' point of view) one of information pluralism, that is, a world with many often-competing knowledge resource sources from which our patrons can choose. Our patrons choose daily between their local library, Google, Amazon, Netflix, iTunes, TiVo, radio, podcasts, newspaper, Wikipedia, Yahoo, Audible, and so forth. Whatever is perceived as having sufficient quality and is the easiest to use usually first garners our patrons' attention—usually this turns out to be Google.

From our patrons' point of view, what counts most is what works best (and 'best' can be thought of as whatever is the quickest, most convenient, and least expensive). The meaning of 'quality' in this context has shifted *from* ultimate accuracy, comprehensiveness, completeness, and authority—to perceived sufficient quality, convenience and ease of use. (I believe it is libraries' job to make accurate and complete knowledge resources available to our users in the most convenient way possible, but that's another discussion.)

Next, I consider interlibrary loan: Is it a means or an end? Clearly, acknowledging our pluralistic environment, ILL is just one of several means to the end of keeping our customers satisfied; it's a puzzle piece but by no means the whole puzzle:

- First, most of our patrons get most of what they want from libraries, from their local library collections. And nationally, less than 2% [Dempsey, cited below] of libraries' circulations are from ILL.
- At the same time our patrons have many good non-library choices for obtaining their knowledge resources. Our users find (for example) search engines more attractive than do the libraries:

“Search engines fit the information consumer's lifestyle better than physical or online libraries. The majority of U.S. respondents, age 14 to 64, see search engines as a perfect fit. (Part 3.7)”

Perceptions of Libraries and Information Resources (2005). Conclusion, page 6.3. OCLC. [http://www.oclc.org/reports/pdfs/percept\\_concl.pdf](http://www.oclc.org/reports/pdfs/percept_concl.pdf)

If we want to compete with Google and Amazon, or merely retain a degree of local relevancy, our patrons must experience their libraries as being 'a good fit'. Being a big fan of libraries and their essential role in their communities, I'd like libraries to be the best or among the best fits available to our patrons.

Where as once ILL was the only means of obtaining for our patrons materials not owned by our library, now ILL is just one of many means of meeting needs which require external resources. The Web, specifically, offers literally millions of wonderfully convenient free and for-fee knowledge resources. If our goal is to meet our patrons' needs with materials (that we own or materials we obtain from sources), our strategies must include more than ILL.

Our patrons just want to get-it. Whether the book (article, film, etc.) in question is owned by their library, by another library and borrowed through interlibrary loan, or is purchased locally or from a distant distributor—our patrons just want to get it quickly, at little or no expense, and with

maximum convenience. To help think this through I've borrowed from OCLC VP and Chief Strategist Lorcan Dempsey's analysis of library services from his weblog (cited below). Dempsey ascribes four parts to content-related library services:

Discovery  
Location  
Request  
Delivery

"Libraries, logistics and the long tail." Lorcan Dempsey, Lorcan Dempsey's weblog. February 15, 2006  
<http://orweblog.oclc.org/archives/000949.html>

The State Library's Fulfillment Task Force might usefully consider how these four general processes, together as parts of the whole, contribute to our patrons getting their book (etc.). Using Dempsey's structure we can begin thinking about where the Task Force might affect improved outcomes for Montana libraries' patrons via improved fulfillment processes.

Discovery—It's never been easier for patrons or librarians to find what they're looking for in other libraries (or elsewhere). Online catalogs, group catalogs such as MLNCAT or ORBIS/CASCADE, and WorldCat.org have made discovery easy. There are relatively inexpensive and easy unimplemented opportunities for improving the discovery process for most Montana libraries. Many states and library consortia, including Montana, have implemented smooth discovery mechanisms. We can borrow and build on any number of others' best practices.

Location—Most Montana libraries lack integrated, comprehensive, easy-to-use tools for finding a service that can and will supply a book once we've discovered that it exists. This is where we might introduce choices to our patrons, offering to let them borrow it locally, from another library, from another library with expedited delivery, obtain it in various formats, or purchase it (personally) from a commercial source. There are many opportunities for improving the get-it process here. Here too we can borrow from other consortia's successes.

Request—standard interlibrary loan mechanisms and new peer-to-peer holds-based and system mediated requests have significantly reduced the per-transaction costs of ILL (while ILL volume goes up). Several dozen Montana libraries are experimenting with patron-initiated, machine-mediated request mechanisms. To the degree these experiments are successful they provide opportunities for the Task Force to direct resources and change policy in support of improving the get-it process for our patrons. There are several emerging alternatives here that build on Montana's nationally acknowledged leadership in this area.

Delivery—e-texts, fax, and magazine articles are quickly and inexpensively moved from source to patrons, at speeds that would have been unimaginable fifteen years ago. However, books and other 'returnables' are still expensive to move from place to place and the increased volume of items has made courier systems as attractive as they are necessary, being as they are the economically and logistically best choice for groups of libraries to meet patrons' increased demand for corporal library materials. There are good practices to build upon in Montana, and many exemplar courier services in nearby states. There are more atoms being moved between libraries than ever before, thanks to our patrons success in discovering, locating, and requesting items not held in their local libraries.

Thanks for sticking with me. I find it helpful to parse things out, our options come into sharper focus when I step back and look at what we're attempting to accomplish. I'll sum up:

The Task Force would be in error to focus initially on interlibrary loan. Everything is measured by the speed and ease that our patrons get exactly what they're looking for. Fulfilling our patrons' needs is a complex task, and while there's lots of room to improve what and how we do things (such as ILL), our strategy must include the whole, not immediately focus on a few of the parts. We place our cart before our horse when we focus on ILL (or statewide library cards) before we develop a comprehensive statewide get-it strategy—which is our charge as the Fulfillment Task Force.

Bruce Newell

---

**The following message was sent by Ann Rutherford on September 6, 2007 at 1:11 pm:**

“The Task Force would be in error to focus initially on interlibrary loan. Everything is measured by the speed and ease that our patrons get exactly what they're looking for. Fulfilling our patrons' needs is a complex task, and while there's lots of room to improve what and how we do things (such as ILL), our strategy must include the whole, not immediately focus on a few of the parts. We place our cart before our horse when we focus on ILL (or statewide library cards) before we develop a comprehensive statewide get-it strategy—which is our charge as the Fulfillment Task Force.” Bruce Newell

Bruce,

I think that was my point. It is not about ILL, but about getting materials to the users quickly, in a cost effective manner.

- Absolutely it is about a cost effective courier/delivery system first, that delivers to the most users in the state; backed up with support for those who are too isolated to receive items that way.
- Absolutely it is about a 'state card' that allows 'everyone' a seat at the table, as the user could go to 'any online catalog' and place a HOLD even if their local library didn't have an online catalog.
- And of course we will only have the monies that 'ILL' used, which means it might not cover all costs.
- But again, it never did, so we will have to make whatever the amount is be as effective as possible.

I thought you had it when you listed your four Dempsey focus items. If I have misunderstood, please clarify what I didn't 'get' ☐

Just me, ann

---

**The following message was sent by Honore Bray on September 6, 2007 at 1:16 PM:**

I would agree with these statements. It does not depend on the size of the library or their staff, the amount of materials one library owns or the funding we all have. It is about the users and getting the information they want in a timely and efficient manner. The user doesn't care where it comes from or how it gets there, they just want the materials. It is a very complex issue and once we define the bits and pieces it will be much easier to look at the whole picture.  
Honore

---

The following message was sent by Ann Rutherford on September 10, 2007 at 10:15 am:

Sarah,

I have been thinking about this in regard to the fulfillment committee. IF we had a state library card, then even small libraries could 'use' this service right? I was thinking of it like INFOTRAC. Even if the user didn't have a catalog online, they would know that it existed and would have access. AND, if this is as successful as it 'might' be, by using unlimited downloads for popular authors and books, that would cut down on the ILL/NCIP/WorldCat/Courier Delivery System cost, right?

So this becomes an issue that is discussed in 'task three' of the fulfillment task force? Right?

Just me, thinking, listening and wondering. Yes, I am also in the middle of three other tasks, but I read your email and then just had to ask ☐

ann

Ann Rutherford  
Library Director  
Miles Community College

---

**The following message was sent by Sarah McHugh on September 10, 2007 at 9:38 AM. This message leads off a string of E-mail traffic discussing downloadable audiobook content that Ann Rutherford felt her fellow FTF colleagues would be interested in reading:**

---

**Subject:** FW: [Audiobooks] Barry's response to my proposal: A new physical medium for audiobooks

This discussion thread might interest this group. A few people on the audiobook listserv have been discussing different approaches to downloading content.

Sarah

---

The following message was sent by James Wallace Harris sent on September 10, 2007 at 6:37 AM:

**Subject:** Re: [Audiobooks] Barry's response to my proposal: A new physical medium for audiobooks

I have a different approach. I wrote about it in my blog at:

<http://jameswharris.wordpress.com/2007/08/28/drm-and-itunes-and-rhapsody-music/>

I think the subscription model has merits for the internet age. If most people were subscribers, and I use the Rhapsody Music as a model here, we wouldn't be worrying about DRM because you don't worry about owning anything. I think the same model could apply for audio books. Audible.com is close to what I'm talking about but it has limits. Imagine if Audible.com didn't have limits on what you could download – that it was just a digital library that you pay a monthly fee to, like Netflix or Rhapsody.

This model removes the problem of DRMs and hardware, but for it to work would require a huge population of people to use it. I have access to millions of songs and I don't own any of them. I also don't worry about backing them up, or how to store them, or how to file them.

Audible.com is so cheap I consider them a rental site now. If they went out of business and I never had access to my books again from them I'd still consider them a great bargain.

I think the hang-up is people want to OWN digital possessions, and that's not really practical.

Jim

The following message was sent by Gary Petraccaro on September 10, 2007 at 4:36 AM:

**Subject:** Re: [Audiobooks] Barry's response to my proposal: A new physical medium for audiobooks

Nobody I know would buy a device where the download wasn't protectable, backup-able. Your idea has ease of use but no protection for the investment. David's is more complicated, but has permanence in it's favor. Both can be broken if there's an audio output and someone wants to take the trouble, but I'm not sure that's a big deal given the apathy of most users.

The following message was sent by barryem@yahoo.com on September 9, 2007 at 4:34 PM:

**From:** Barry

**To:** [Audiobooks@list.audiodiversions.com](mailto:Audiobooks@list.audiodiversions.com)

**Sent:** Sunday, September 09, 2007 4:34 PM

**Subject:** Re: [Audiobooks] Barry's response to my proposal: A new physical medium for audiobooks

--- "David H. Straayer" <[mail@dhstraayer.com](mailto:mail@dhstraayer.com)> wrote:

> Gee, you raise a few good points, but are you pretty  
> negative all around. How about trying to help seek  
> a solution by providing some alternatives, or  
> workarounds?

Sure. Downloads.

Or a vending machine that you plug your player, be it Ipod, MTP or UMS into, feed your credit card and it puts the book on your player. The book can be encrypted but the user won't be bothered with that. It can be downloaded through the vending machine directly from Audible/Itunes/etc and the player can be activated right then if need be or already be activated from a previous session. That means Audible and Itunes and other services' customers won't even have to be computer users.

Nothing new is needed in the way of players. The only missing ingredient is the vending machine and I'm pretty sure no new technology would be needed for that.

- > I assert that the audiobook industry needs a new
- > physical medium -
- > piggybacking off of music-suitable media is "running
- > out".

I don't agree that the industry needs a new physical medium.

- > Cassettes are pretty much dying.
- > CD's are fragile, and it takes an expensive stack of
- > them for unabridged
- > books.

I have an external hard drive in which I keep books that I might choose to listen to in the next year or so. I currently have 254 books on board ready to go in about 55 gig and another 200 or so books ripped and ready to combine into long files (the way I prefer to listen) taking up another 40 gig or so. That's a total of 95 gig on a 500 gig drive that today costs about \$125. Most of these are also backed up on data DVDs which take up probably about 2 cubic feet of storage space. Try beating that with any physical playable media.

Expensive? I don't know. I've been collecting these for years. I have no idea how much I've spent but since the majority were from used tapes it's far less, a small fraction, really, than it might have been if I'd bought them on any media available today.

By the way, the 500 gig hard drive is about the shape and size of a fairly small paperback book. If I had nothing but books on it it could hold probably a few thousand books. I could have a second one for a backup copy just in case and be pretty safe and it still would be just about the cheapest storage and the smallest storage imaginable.

- > Any new medium will either be easy to copy, or
- > burdened by consumer-unfriendly anti-copy digital
- > rights management. Which should it be?

Easy to copy, of course. That would put us one step closer to a perfect world. Ain't gonna happen!

- > You say "...it [my proposed USB-drive medium] would
- > be more expensive than audio CDs to make...". Back
- > that up. 1 gig flash drives are selling for
- > \$10, and 15-CD audiobooks are selling for \$40+.
- > Movies that cost tens to hundreds of millions to
- > produce are selling for \$20.

My guess, and it's just that, is that the 15 CDs cost less to manufacture than the \$10 1 gig flash drive. By the way, retail they surely cost less to buy. I

use Imation CDs and pay 23 cents each for them, retail. That means 15 of them would be about \$3.45, again, retail.

> Sure, right now, only a few MP3 players accept a USB  
> flash drive directly.

I don't know of any currently being made that do that. There may be some. Sandisk made one called the Cruiser for a while. I haven't heard or seen any mention of it in the past couple of years. I have no idea of it's abilities.

Barry