

To: Fulfillment Task Force

From: Darlene Staffeldt

Date: 01/17/08

Re: Summary of email traffic since mid November

I have tried to capture all the emails for the Fulfillment Task Force since mid November.

Received from Bonnie Allen on 11/16/07:

Link is

http://www.leg.state.or.us/comm/commsrvs/librarycooperation_report_final.pdf

Bonnie Allen

Dean of Libraries

University of Montana

From: Staffeldt, Darlene [mailto:dstaffeldt@mt.gov]

Sent: Monday, December 03, 2007 4:14 PM

Subject: Minutes and potential recommendations

Please find attached the draft of the minutes from the November 16, 2007 meeting. Thank you all for all your efforts and discussions at that meeting. Please let me know if you recommend any additions or corrections to the minutes. The second file is a copy of the potential recommendations from our discussions. Please review them carefully and let me know if you are ready for me to share them with Wired-MT as well as the Commission. Again, this is just a heads up as to what the Task Force is working on, these are not necessarily final recommendations. Thank you to those who have already completed their tasks from the meeting, the minutes will provide a heads up to those of us who still have tasks to accomplish. I am looking forward to hearing from you all on the potential recommendations as soon as possible. Have a good day. Thanks, Darlene

----- Original Message -----

From: [Staffeldt, Darlene](#)

Sent: Tuesday, December 11, 2007 8:41 AM

Subject: Recommendations

Dear Task Force members, Thank you to those who have sent me comments on the potential recommendations and minutes. From the comments received I have provided two options for the first recommendation. Please let me know which recommendation (1) or (2) you are most comfortable moving forward with and best reflects what you remember from our discussion. Please let me know YES if you are comfortable at this time with me releasing all of these potential recommendations to the Commission and Wired-Mt. Thank you for your response as soon as possible. Darlene

At their November 16, 2007, Fulfillment Task Force meeting the Task Force discussed the following as potential recommendations to come from this Task Force. The Task Force would like to explore and if possible implement the following recommendations:

- (1) The Interlibrary loan reimbursement program and associated monies be repurposed to assist with resource-sharing or additional content (available statewide) to reduce the level of local funds required to support statewide resource sharing activities.
- (2) The Interlibrary loan reimbursement program and associated monies be repurposed to provide for programs, services and/or benefits that will help libraries across the state provide better services to Montana's citizens.
- A voluntary statewide materials delivery system.
- Secure statewide funding for OCLC services for Montana's libraries.
- Provide additional electronic content statewide.
- Secure statewide funding for all costs/partial cost for all libraries to participate in the Montana Shared Catalog.
- Provide increased collection resources in the state.
- Requesting additional state aid to provide appropriate leveraging of best practice mandates of public library standards and amount of state aid distributed to Montana's public libraries.
- Implementation if possible a voluntary statewide library card program.

12/11/07 1:03pm

Hello Darlene et al,

'Tis a crisp, wind-free, sunny, snowy day in Cut Bank, MT - beautiful . . .

I like (1) better.

Don't think "if possible" should be in the last bullet since it is included in the preface. "If possible" correctly applies to all. Could read - "Implementation of a voluntary statewide library card program."

I agree with Bruce that we need more details in regard to a statewide library card but that would pertain to all recommendations as well. I guess I think of that as the "explore" part in the preface.

What exactly do we mean by "Provide increased collection resources in the state."? Is this above and beyond e-content mentioned earlier? Don't think this would be clear to those on wired-mt.

Should "Requesting additional state aid . . ." also include reference to resource sharing since we are concerned with repurposing interlibrary loan monies and fulfillment? Is it possible to apply specific programs to requesting additional state aid?

Thanks for listenin',
Della Dubbe
Glacier County Library

12/11/07 3:04pm
Darlene,

Thanks to you and your staff for putting together our thoughts in a concise manner.

I feel that number 1 is the best choice for the statement about repurposing the monies. The rest of the bullets are fine.

I do have a question/comment about the last bullet – didn't we struggle with a definition of what this could be – a physical card – an agreement among all libraries to check out material to MT residents? Could it be reworded to include something that says voluntary statewide library card and/or voluntary statewide library access ?

Patricia M. Collins
Administrative Manager
Mansfield Library

From: Cochran, Bill [CochranB@ci.billings.mt.us]
Sent: Tuesday, December 11, 2007 4:48 PM

I'm not sure we have to be very clear about what we're going to recommend the repurposed funds for, since we're not very clear yet, as much as we should clearly state that we think the ILL funding should be repurposed; that's substantive enough for the Commission and the library community to get their arms around as a first report.

Beyond that, I'd suggest a fairly inclusive recommendation that actually combines the two proposed drafts. I think, as Bruce says, unless we're clear that our re-purposing won't include resource-sharing we should keep that language in, although I think we should delete reference to reducing local funding required, because some of the bullet points don't do that so much as provide more service for the same local funding. I also think we can use the language in the second draft that extends the benefit out to Montana citizens.

I'd be comfortable with:

The Interlibrary loan reimbursement program and associated monies be repurposed to assist with resource-sharing, additional content, or other programs, services and/or benefits that will help libraries

across the state provide better services to Montana's citizens. The Task Force would like to further research the following possibilities and return with a specific set of recommendations for use of the repurposed interlibrary loan funding.

* Bullets as distributed...

Thanks for your work on this and for asking for all our input.

Take care,

Bill

Bill Cochran
Director
Parmly Billings Library

-----Original Message-----

From: Honore Bray [<mailto:hbray@missoula.lib.mt.us>]
Sent: Tuesday, December 11, 2007 10:14 PM

I agree with Bill and Della. I think if the wording is not specific to a project it still gives the direction we wish to move.

Honore

12/12/07 10:49 am

The repurposing should include ways to tie into ILL/resource sharing activities, perhaps going towards WorldCat resource sharing accessibility, scanners for electronic delivery, postage, etc. The formula used now doesn't work, but the need to fund those activities is still there.

I also agree with Bill regarding the terminology "level of local funds".

Mary Guthmiller
Team Leader
Resource Sharing/Document Delivery
The Libraries - 1 Renne Library
Montana State University - Bozeman

From: Staffeldt, Darlene [<mailto:dstaffeldt@mt.gov>]
Sent: Thursday, December 13, 2007 4:45 PM
To: Cochran, Bill; bnewell@mt.net; carowells3@nemont.net; chotlibr@montanavision.net; gbacon@mtlib.org; glibrary@northerntel.net; guthmill@montana.edu; Honore Bray; jemeckler@gmail.com; mthayer@niaid.nih.gov; patricia.collins@umontana.edu; rlibrary@cablemt.net; Ron Moody; rutherforda@milescc.edu
Cc: Cooper, Bob; McHugh, Sarah; Cook, Tracy; Reymer, Suzanne; Meredith, Maggie
Subject: RE: Recommendations

Okay folks, I have heard from some of you but not all of you. Your silence will be taken as agreement unless I hear from you by Monday morning. Please know that the following "hopefully

final" draft will be sent to Wired-MT on Monday morning, 12/17/07 at 9:00 am, unless I hear from a majority of the full task force not to send it out. I did verbally share this with the Commission at their meeting yesterday. Thank you for all your efforts. Darlene

DRAFT

At their November 16, 2007, Fulfillment Task Force meeting the Task Force discussed the following as **potential** recommendations to come from this Task Force. The Task Force would like to **explore** and **if possible implement** the following recommendations:

- The Interlibrary loan reimbursement program and associated monies be repurposed to assist with resource-sharing, additional content or other programs, services and/or benefits that will help libraries across the state provide better services to Montana's citizens.
- A voluntary statewide materials delivery system.
- Secure statewide funding for OCLC services for Montana's libraries.
- Provide additional electronic content statewide.
- Secure statewide funding for all costs/partial cost for all libraries to participate in the Montana Shared Catalog.
- Provide increased collection resources in the state.
- Requesting additional state aid to provide appropriate leveraging of best practice mandates of public library standards and amount of state aid distributed to Montana's public libraries.
- A voluntary statewide library card program.

From: Montana Listserv on behalf of Bruhn, Anastasia
Sent: Mon 12/17/2007 9:42 AM
To: WIRED-MT-L@OCLC.ORG
Subject: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

At their November 16, 2007, Fulfillment Task Force meeting the Task Force discussed the following as potential recommendations to come from this Task Force. The Task Force would like to explore (do further research on) and if possible implement the following recommendations:

- * The Interlibrary loan reimbursement program and associated monies be repurposed to assist with resource-sharing, additional content or other programs, services and/or benefits that will help libraries across the state provide better services to Montana's citizens.
- * A voluntary statewide materials delivery system.
- * Secure statewide funding for OCLC services for Montana's libraries.
- * Provide additional electronic content statewide.
- * Secure statewide funding for all costs/partial cost for all libraries to participate in the Montana Shared Catalog.
- * Provide increased collection resources in the state.
- * Requesting additional state aid to provide appropriate leveraging of best practice mandates of public library standards and amount of state aid distributed to Montana's public libraries.
- * A voluntary statewide library card program.

To review the Fulfillment Task Force (FTF) membership, meeting materials, and/or to make comments or suggestions to the FTF, please see the FTF website at:
http://www.msl.mt.gov/About_MSL/fulfillment_task_force/fulfillment_tf.asp

Or call or write to Darlene Staffeldt, State Librarian at 406-444-3115; dstaffeldt@mt.gov

The following two messages are from the website comment box:

Sent: Monday, December 17, 2007 10:20 AM
 Subject: Fulfillment Task Force Comments

thoughts = Thanks for the work you are doing. The following three potential recommendations make wonderful sense. If these were funded, I think the delivery system could wait, as we can make do with mail service/bus services and associated expenses and wait time.

Secure statewide funding for OCLC services for Montanas libraries.

Secure statewide funding for all costs/partial cost for all libraries to participate in the Montana Shared Catalog.

The Interlibrary loan reimbursement program and associated monies be repurposed to assist with resource-sharing, additional content or other programs, services and/or benefits that will help libraries across the state provide better services to Montanas citizens.

name = Suzanne Goodman
 library = Park High Library

Sent: Monday, December 17, 2007 10:52 AM

thoughts = THE e-mail sent today to the WIRED listserv seems a bit vague.
 name =

.....

From: Beth Boyson [mailto:BBoyson@BOZEMAN.NET]
Sent: Tuesday, December 18, 2007 8:24 AM
To: Montana Listserv; Bruhn, Anastasia; WIRED-MT-L@OCLC.ORG
Subject: RE: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

'voluntary'

please elaborate

does that mean unfunded?

or voluntary / optional participation?

or staffed by volunteers?

Please let me know when you get a chance

Thank you!

Beth Boyson

-----Original Message-----

From: Montana Listserv [<mailto:WIRED-MT-L@OCLC.ORG>] On Behalf Of McHugh, Sarah
Sent: Tuesday, December 18, 2007 8:53 AM
To: WIRED-MT-L@OCLC.ORG
Subject: Re: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

Beth,
My understanding of the FTF discussions is that "voluntary" means that libraries could choose whether or not to participate.

Sarah McHugh
Statewide Projects Librarian
Montana State Library

From: Montana Listserv [<mailto:WIRED-MT-L@OCLC.ORG>] On Behalf Of Honore Bray
Sent: Tuesday, December 18, 2007 9:34 AM
To: WIRED-MT-L@OCLC.ORG
Subject: Re: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

Beth,
I always see Volunteer as something I am choosing to do so I will need to find local funding for that program. It could be like the new downloadable project where there is state money to start the program but the only way to make it fly is local funds.
Honore

From: Montana Listserv [mailto:WIRED-MT-L@OCLC.ORG] **On Behalf Of** Bruce Newell
Sent: Tuesday, December 18, 2007 11:00 AM

To: WIRED-MT-L@OCLC.ORG

Subject: Re: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

My understanding, as a member of the FTF, is that libraries would choose to participate, or not. There would not be a requirement to participate. Hence, 'voluntary'.

Bruce

-----Original Message-----

From: Montana Listserv [<mailto:WIRED-MT-L@OCLC.ORG>] On Behalf Of Beth Boyson

Sent: Tuesday, December 18, 2007 11:40 AM

To: WIRED-MT-L@OCLC.ORG

Subject: Re: Fulfillment Task Force Information

I worry that voluntary means unfunded and the result is the small libraries get left out. I hope the scenario Honore describes: 'there is state money to start the program but the only way to make it fly is local funds' might work out.

BB

-----Original Message-----

From: Montana Listserv [<mailto:WIRED-MT-L@OCLC.ORG>] On Behalf Of Thayer, Martha (NIH/NIAID) [E]

Sent: Tuesday, December 18, 2007 11:50 AM

To: WIRED-MT-L@OCLC.ORG

Subject: Re: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

Beth and all:

My view: participation in the delivery system would be voluntary, however I should think it possible that some of the "repurposed" money could be used to help pay for this. No authority behind this, of course.

I am assuming you were asking about the "voluntary" that was attached to the delivery system item, not the statewide library card item, but perhaps you were referring to both?

Martha

Martha Thayer
Librarian
Rocky Mountain Laboratories

From: Montana Listserv [<mailto:WIRED-MT-L@OCLC.ORG>] **On Behalf Of** Cochran, Bill

Sent: Tuesday, December 18, 2007 4:56 PM

To: WIRED-MT-L@OCLC.ORG

Subject: Voluntary Statewide Library Cards

As a member of the Montana State Library's Fulfillment Task Force, I think it is the consensus of the group that we have not yet developed specific definitions for the list of programs and services that we plan to research further, including statewide library cards.

I am most familiar with the State Library of Iowa's Open Access program, which I helped establish in the late 1980s. Iowans can walk into any of the 605 voluntarily participating libraries, of all types, check out materials, and return them to the lending library or their own local public library; the lending library receives a small reimbursement from the State Library. By 2006, Open Access had become so successful that 3,606,345 items were checked out through the program, while only 259,497 interlibrary loans were made under the Access Plus ILL reimbursement program.

Another similar program is the Connecticut State Library's Connecticard.

I believe it is our intent to obtain more information from these and other models around the country to discuss their potential for Montana.

Bill

Bill Cochran
Director
Parmly Billings Library

From: Montana Listserv [mailto:WIRED-MT-L@OCLC.ORG] **On Behalf Of** Donna Worth
Sent: Wednesday, December 19, 2007 1:59 AM
To: WIRED-MT-L@OCLC.ORG
Subject: Re: Fulfillment Task Force Information Sent on Behalf of Darlene Staffeldt

Ohhh, these sound wonderful! Let's do it! Sure, there will be bugs to be ironed out but you never get anywhere if you don't take a step or two. Will this help the library patrons of Montana? I think it will. Will it mean having to do things in a different way? You betcha! I know that makes many people uncomfortable but getting shaken out of a rut can be a very good thing.

Donna, who never likes to do things they way they've always been done, Worth
Whitehall Community Library

-----Original Message-----

From: Montana Listserv [mailto:WIRED-MT-L@OCLC.ORG] On Behalf Of
Reymer, Suzanne
Sent: Thursday, December 20, 2007 11:38 AM
To: WIRED-MT-L@OCLC.ORG
Subject: [Fwd: Physical Delivery Discussion Group at Midwinter]

Is anyone from the Fulfillment Task Force going to ALA Midwinter? This might be a good discussion group to join so we can stay on top of what other states are doing?

Suzanne

Physical Delivery Discussion Group

Explore best practices related to the physical delivery of materials between libraries and delivery directly to patrons. Our goal is to

increase and improve high volume, low cost delivery options to libraries. We'll discuss best practices related to physical delivery, including in-house trucking systems, contracting with courier companies and using national services like UPS or Fed Express. Question: do we want to do an IMLS grant to explore linking existing courier systems?

*Sunday 1/13/2008 *

*08:00 am - 10:00 am *

Philadelphia Marriot Room 305

This is a new discussion group, please come and help us establish our direction for the future.

Valerie Horton, Executive Director

Colorado Library Consortium

770 W. Hampden Ave., Suite 340

Englewood, CO 80110

(303) 422-1150; 888-206-2695

www.clicweb.org <<http://www.clicweb.org>>

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From: Staffeldt, Darlene [mailto:dstaffeldt@mt.gov]

Sent: Friday, December 21, 2007 3:41 PM

To: Bruce Newell (bnewell@mt.net); carowells3@nemont.net; chotlibr@montanavision.net; cochranb@ci.billings.mt.us; gbacon@mtlib.org; glibrary@northerntel.net; Guthmiller, Mary; hbray@missoula.lib.mt.us; John Meckler (jmeckler@gmail.com); mthayer@niaid.nih.gov; patricia.collins@umontana.edu; rlibrary@cablemt.net; Ron Moody; rutherforda@milesc.edu

Cc: Cooper, Bob; Cook, Tracy; Meredith, Maggie; Reymer, Suzanne; McHugh, Sarah; Stewart, Julie

Subject: Two or three things

Dear FTF members,

We are having some scheduling issues with the meeting room(s) for our meeting planned for Friday, January 25, 2007. Will it work for your calendars if we move that meeting to Friday, February 1, 2007? Please let me know as soon as possible.

Are any of you going to the ALA midwinter conference in Philadelphia in January? There is a discussion session that would be good to attend if possible. See the details below:

Physical Delivery Discussion Group

Explore best practices related to the physical delivery of materials between libraries and delivery directly to patrons. Our goal is to increase and improve high volume, low cost delivery options to libraries. We'll discuss best practices related to physical delivery, including in-house trucking systems, contracting with courier companies and using national services like UPS or Fed Express. Question: do we want to do an IMLS grant to explore linking existing courier systems?

Sunday 1/13/2008

08:00 am - 10:00 am

Philadelphia Marriot Room 305

This is a new discussion group, please come and help us establish our direction for the future.

I will be sending on to you a few reports put together by your fellow members based on last meetings discussions. We still have more work to get out to you as well.

A piece on statewide library card systems in other states

Ill statistics with neighboring states

The Oregon report that Bonnie Allen referred to in her presentation.

Thanks for all your efforts. Happy Holidays to all of you. Darlene

12/21/07 4:47pm

[Here's the stats from UM in word 2003](#)

Happy Holiday to everyone!

Patricia M. Collins
Administrative Manager
Mansfield Library
The University of Montana

From: Guthmiller, Mary [mailto:guthmill@montana.edu]

Sent: Thursday, January 03, 2008 2:58 PM

To: bnewell@mt.net; carowells3@nemont.net; chotlibr@montanavision.net; cochranb@ci.billings.mt.us; gbacon@mtlib.org; glibrary@northerntel.net; Guthmiller, Mary; hbray@missoula.lib.mt.us; jemeckler@gmail.com; mthayer@niaid.nih.gov; patricia.collins@umontana.edu; rlibrary@cablemt.net; Ron Moody; rutherforda@milescc.edu

Cc: Cooper, Bob; Cook, Tracy; McHugh, Sarah; Meredith, Maggie; Reymer, Suzanne; Stewart, James

Subject: FW: CURRENT UPS PROPOSALS FOR MONTANA

Here are the files that Cindy (our UPS rep) could find regarding the UPS agreement(s).

As you can see by the first attachment, several entities are associated with it; of which our library is one of them. You may find your library amongst the listings as well.

Mary Guthmiller
Team Leader
Resource Sharing/Document Delivery
The Libraries - 1 Renne Library
Montana State University - Bozeman

From: csipes@ups.com [mailto:csipes@ups.com]
Sent: Friday, November 30, 2007 10:53 AM
To: Guthmiller, Mary
Subject: CURRENT PROPOSALS FOR MONTANA STATE

Hi Mary!!

As per our conversation, attached are the current incentives. Incentive # P160015325 expires 7-10-2010. Incentive # P860015123 expires on 7/05/08. The last one, I could not find an expiration date at all. It may not even be in effect anymore. I will call you Tuesday afternoon to discuss.

Thanks!
Cindy

01/09/08 1:51 pm

The information about Iowa in this follow up report is backwards. I shared the correct information in my WIRED-MT posting of 12-18-07, but will quote the specifics of the Open Access and Access Plus programs from the *FY06 Enrich Iowa Report: State Funding for Iowa Libraries*, prepared for Governor Chester J. Culver and the Iowa General Assembly, January 15, 2007, available from the State Library of Iowa website. The first page of this report includes the following.

“Open Access allows Iowans to walk into any participating Iowa library and borrow books and other materials. Borrowers simply return the materials to their local public library, which will pay to ship the items back to the loaning library. Open Access reimburses a small portion of the expense involved. Iowans checked out 3,606,345 items from 605 libraries in FY06. Open Access funding in FY06 was \$1,094,376 (\$436,431 from the general fund and \$630,946 from the Rebuild Iowa Infrastructure Fund.

Libraries are reimbursed part of the cost of mailing materials to other Iowa libraries through the **Access Plus** interlibrary loan program, which allows Iowans to borrow books and materials from another library if their library doesn't own them. The 605 participating libraries loaned 259,497 items in FY06. Access Plus funding in FY06 was \$302,604 (\$235,000 from the general fund and \$147,596 from the Rebuild Iowa Infrastructure Fund.”

Open Access is the statewide library card program, although it does not utilize a physical card. Access Plus is simply the interlibrary loan reimbursement program. As I noted in my earlier posting, the statewide card program generates 14 times the number of circulations that interlibrary loan does.

Bill

Bill Cochran
Director
Parmly Billings Library