



## **Moving Forward – Summary Report on Interlibrary Loan Services<sup>1</sup>**

February 2016

### **A. Plan of Service**

1. Goal Statement: MHLS will facilitate access to nationwide collections for member libraries.
2. Intended Result(s):
  - a. Member libraries will have reasonable, cost-effective access to material outside of MHLS and regional (SEAL) holdings.
  - b. Results will be maximized based on exploration of ILL opportunities.
3. Evaluation Method(s):
  - a. Ongoing review of ILL usage patterns, statistics, capacity and cost.
  - b. Annual advisory committee assessment of ILL cost effectiveness.
4. Annual Progress Report (2014):
  - a. Facilitated 376 requests from member libraries from patrons for materials not available in the MHLS collection, and over 1,582 requests from outside libraries for materials in MHLS libraries. Communicated with lending libraries across the continental US regarding loan period and costs on behalf of member libraries.
  - b. Participated in regional resource sharing discussions about increasing member library access to materials outside of the consortium and cost efficiencies in resource sharing.

### **B. Outputs (2014)**

1. OCLC:
  - a. (Borrower Activity) Items Requested<sup>2</sup> by MHLS Member Libraries for Materials Not Available in Sierra<sup>3</sup> or SEAL<sup>4</sup>: 376 requests (minus 9 cancellations); 306 requests filled = 83% fill rate<sup>5</sup>
  - b. (Lender Activity) Items Requested by Out-of-System Libraries for MHLS Member Library Materials: 1,582 requests (minus 12 cancellations); 475<sup>6</sup> requests filled = 30% fill rate<sup>7</sup>
2. MISP (Medical Information Services Program)<sup>8</sup>: 52<sup>9</sup> requests received from MHLS member libraries; 45 requests filled = 87% fill rate.

<sup>1</sup> GENERAL DEFINITION – **Interlibrary loan** (abbreviated **ILL**) is a service whereby a user of one library can borrow books or receive photocopies of documents that are owned by another library. The user makes a request with their local library, which, acting as an intermediary, places the request, receives the item, makes it available to the user, and arranges for its return. The lending library sets the due date and overdue fees of the material borrowed.

<sup>2</sup> Almost all items were non-fiction books requested from colleges/universities.

<sup>3</sup> MHLS ILS.

<sup>4</sup> SEAL (Southeastern Access to Libraries): Regional gateway to academic, special, public, and school library holdings in the Southeastern Mid-Hudson Valley region, including Columbia, Dutchess, Greene, Orange, Putnam, Rockland, Sullivan, and Ulster.

<sup>5</sup> OCLC Borrower Activity is influenced by several factors: owning libraries can choose not to fill a request; some requests are for items that do not circulate; requesting patrons may be unwilling to pay the lending library's fee (e.g., OCLC fee, postage costs); as per the MHLS Directors Association, as of 1/1/09 the MHLS ILL Department cannot accept requests for popular, readily available DVDs and music CDs; as per the MHLS Directors Association, as of 10/1/11 the MHLS ILL Department cannot accept requests for any item readily available for under \$25.

<sup>6</sup> Over 50% of the OCLC filled requests (received from out-of-system libraries) were for media - approximately 2/3 video recording; 1/3 sound recording (Book on CD; music). In January 2015, MHLS ILL services began lending only non-fiction video recordings.

<sup>7</sup> OCLC Lender Activity is influenced by several factors: MHLS current holdings are not in OCLC WorldCat; owning libraries can choose not to fill a request; some requests are for items that do not circulate, are 'in use', too new (published within the past year) or too popular to lend.; requesting patrons may be unwilling to pay the borrowing fee (this is a normal surcharge that helps offset OCLC and postage costs).



**C. Outcomes**

1. Patrons of member libraries will be supported in their formal and informal educational endeavors by having access to materials not available in the collections of MHLS member libraries.
2. MHLS member libraries will provide materials to their patrons by using Interlibrary Loan Services rather than purchasing materials, resulting in a cost savings for members.
3. MHLS member libraries will support national library resource sharing by loaning materials to libraries not in the MHLS.

**D. Costs Associated with MHLS (2014)**

MHLS STAFF	Percent Interlibrary Loan Services	Salary	Benefits	Interlibrary Loan Services TOTAL
Merribeth	5% <sup>10</sup>	3,910	1,915	5,825
Tara	25% <sup>11</sup>	9,253	1,807	11,060
				<b>16,885</b>
<b>CONTRACTED SERVICES</b>				
	Total Cost		Interlibrary Loan Services Cost	
OCLC Subscription		4,784		4,784
Postage <sup>12</sup>		2,875		2,875
Replacement of Lost Items		65		65
				<b>7,724</b>
<b>TELCOM SERVICES<sup>i</sup></b>				
	Total Cost		Interlibrary Loan Services Cost	
Network & Phone Services <sup>ii</sup>		30,325 – 5,596 (Teleforms) = 24,729		<b>580</b>

<sup>8</sup> MISP is a New York State funded program through the Reference & Research Library Resource Councils.

<sup>9</sup> Approximately 80% of MISP requests are for books.

<sup>10</sup> Includes supervision of MHLS ILL services as well as working to analyze regional intersystem resource sharing issues through SENYLRC Board of Trustees and Technology Review and Advisory Committee (TRAC).

<sup>11</sup> Facilitates access to nationwide collections for member libraries. Fills requests by searching, locating and borrowing print, non-print and electronic materials by using various databases such as the ILS, OCLC, regional and New York State catalogs. Assists and advises library staff on issues such as processes, searching, protocol, ILL standards and copyright compliance. Acts as liaison between nationwide loaning library and member library regarding renewals and overdue statements. Maintains departmental records; provides usage statistics and reports trends to supervisor; provides billing information to Business Office. Keeps up with changes in the ILS related to circulation and holds. Serves on Regional Interlibrary Loan Committee.

<sup>12</sup> USPS Library 1-way rate for 2 lbs (the weight of a standard novel) = \$3.02 X 952 items



IT SERVICES	Total Cost	Interlibrary Loan Services Cost
Hardware <sup>iii</sup>	9,083	213
Software <sup>iv</sup>	5,445	128
IT Supplies	2,213	52
		<b>392</b>
GENERAL OVERHEAD <sup>v</sup>	Total Cost	Interlibrary Loan Services Cost
Supplies	5,732	134
Equipment Rental	16,472	386
Professional Fees	25,189	590
Postage	4,505- 2,875 (ILL) = 1,630	38
		<b>1,149</b>
FACILITIES OVERHEAD <sup>vi</sup>	Total Cost	Interlibrary Loan Services Cost
Staff/Benefits	51,696	1,212
Utilities	27,973	656
Custodial Supplies	1,736	41
Other Ops/Maint	35,776	839
Liability Insurance	15,423	362
		<b>3,108</b>
ADMINISTRATIVE SUPPORT <sup>vii</sup>	Total Cost	Interlibrary Loan Services Cost
Staff/Benefits	361,059	8,464
Professional Development	31,532	739
		<b>9,203</b>
<b><u>TOTAL</u></b>		<b>39,041</b>

**E. Primary Funding Sources**

1. State Aid - General
2. Member Assessment Fees

**F. Value of Services**

1. MHLS Members
  - a. OCLC ILL Borrowed for Member Libraries: 306 x \$25<sup>13</sup> = \$7,650

<sup>13</sup> \$25 is the value of an Interlibrary Loan: [http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library\\_calculator](http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library_calculator)



- b. MISP:  $45 \times \$25^{14} = \$1,125$
- 2. Library Community
  - a. OCLC ILL Borrowed from Member Libraries:  $475 \times \$25^{15} = \$11,875$

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<sup>i</sup> % of total Telecom costs – After staff FTE assigned, breakout of telecom costs by service (break out Teleforms & all other by staff FTE per service)

<sup>ii</sup> Minus Teleform costs

<sup>iii</sup> % of General Hardware/Software costs - After staff FTE assigned (allocate on a per staff calculation)

<sup>iv</sup> OCLC charges to Cataloging Services

<sup>v</sup> % of General Overhead costs - After staff FTE assigned (allocate on a per staff calculation)

<sup>vi</sup> Ibid.

<sup>vii</sup> Ibid.

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<sup>14</sup> Ibid.

<sup>15</sup> Ibid.