

Report to the State Librarian

**Interlibrary Loan Development Program:
History, Results, Recommendations**

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Executive Summary

In 2007, State Librarian Christie Brandau appointed a Task Force to review the Interlibrary Loan Development Program (ILDP) that had been in place since 1983. The group was charged with conducting a review of the history of the program, analyzing the use of funds over the lifetime of the program, constructing a 21st Century mission for the ILDP funding and making recommendations for future use of ILDP funding.

The purpose of the ILDP was reviewed and a statement developed to read as follows:

The mission of the ILDP is to facilitate resource sharing and provide access to all types of library resources for residents of Kansas by supporting the purchase and delivery of materials.

In addition to a mission, the Task Force developed recommendations that include phasing out the current system of ILDP resource and competitive grants, enhancing funding to *Audiobooks, Music and More*, developing a resource sharing incentive program and subsidizing a statewide library courier system.

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Program History

The Interlibrary Loan Development Program was first proposed in 1983 by the Kansas Library Network Board and the State Library. Funding was requested from the legislature in the amount of \$2.2 million per year for 5 years. [The complete plan as proposed can be found in “Kansas Library Network Board Annual Report, November 1, 1983”] It was originally designed to address two issues:

1. Compensation for libraries that loan considerably more materials within Kansas than they borrow.
2. Kansas libraries in 1983 were determined to be more than 2 million volumes below the minimum state standards for collection size.

A program of resource and special library collection development through state-supported coordinated acquisitions was proposed, and sought to achieve the following objectives:

1. Improve library capability to support formal and informal education in Kansas.
2. Assist in bringing interlibrary loan resource library collections up to standard.
3. Provide an economical approach to library collection improvement with the coordination of purchases.
4. Strengthen the research capability of our academic and special libraries.
5. Encourage a pattern of library acquisitions which would build collections of special educational value, the statewide pattern of which would give a comprehensive coverage of the areas of knowledge.
6. Insure the continued participation in the statewide interlibrary loan service of those libraries which have proven to be essential to the previous effectiveness of this program.
7. Respond to an expressed public concern for library collection improvement in a tangible way which would benefit directly every community in the state.

Under the proposed plan, resource libraries, regents institution libraries, qualifying school, community college, private college and special libraries would receive grants for the purchase and processing of information materials within an organized pattern of all areas of knowledge. The emphasis in this coordinated approach to library acquisitions would be to focus the buying power of the grants by building on existing subject collection strengths where they occur in individual libraries and by encouraging purchases in subject areas to an extent above that which the library would be able to achieve with only the local acquisitions budget. The grant program would help build collections of special subject excellence.

Maintenance of local effort in acquisitions would be a requirement for eligibility. Also required would be the agreement that materials purchased through the program would continue to be available to the library network for years to come.

Legislative History

The Kansas legislature funded the program at the end of its 1985 session. \$600,000 was intended as funding for one-half year (Jan. – June 1986), with full funding set at \$1.2 million to begin in FY 1987. The second half funding never occurred.

The program was funded at or above the \$600,000 level for most of the next 25 fiscal years. The original list of 21 resource libraries (four major urban libraries plus at least one from each regional system) was expanded early on to include 2 additional libraries from north central Kansas.

Because the program was never fully funded, the support for other types of libraries did not occur. With less than 9% of the funds allocated for non-resource libraries, only a limited number of small grants were awarded each year.

A report was commissioned in 1991 by the Kansas Library Network Board (KLNb). An evaluation of ILDP was completed by Ed McGlone of Emporia State University. McGlone surveyed resource libraries, competitive grant recipients, and those libraries that had applied for – but not received – an award.

While overall McGlone found great satisfaction and support for the program, he highlights several issues for KLNb to consider and resolve.

[quoting from page 12 of the report]:

1. *Should the KLNb limit either the size or frequency of ILDP awards to an individual library?*
2. *Should the KLNb adopt an assessment plan which provides for a periodic evaluation like this one?*
3. *Should the entire ILDP appropriation be awarded on a competitive basis; should the entitlement portion be curtailed or eliminated?*

“That question [#3 above] was not asked in this survey because of the strong feelings of some Board members; nevertheless the issue has come up in virtually every substantive discussion that this investigator has had with anyone who knows anything about the ILDP. In the long run, the credibility of the ILDP with the taxpayers and legislators may hinge more on the ability of the KLNb members to develop a compelling public position on this issue than on any other consideration.”

1986-2006

The program remained relatively unchanged for the first two decades. Resource libraries purchased materials in their respective collection development areas and were expected to share materials with other libraries.

- Appendix A shows the ILDP Fund History from 1986-2008. The highest amount budgeted was in 2000 (\$693,000) and the lowest amount received was in 1988 (\$400,000).

- Appendix B shows the top lending libraries from 2002-2006. A number of resource libraries were near the bottom of the total lending. This had the result of shifting the burden of lending to libraries that received no funds.
- Appendix C shows the amount expended as a percentage of total local budget for the resource libraries from 1982 (prior to program start) through 2006. It also shows the number of total ILL requests filled in 2006, and the percentage of ILL requests filled in 2006. In all but one case, the percentage of support (as part of the library's total budget) dropped – in some cases by double digits. It is interesting to note that some resource libraries filled half or less of the requests they received.

Data Summary of the ILDP, 1986-2009:

Total ILDP funds distributed: \$14,998,108

Approximate number of items purchased by Resource Libraries = 500,000

Approximate cost of each item = \$27.50

Total funds granted in competitive grants: \$1,364,000 (approximately 9% of ILDP)

ILDP Program Outcomes 1986-2006

Program Outcomes

1. Over 500,000 items were purchased for libraries during 1986-2006.
2. The program had the effect of “freezing in time” the ILL resource sharing environment of 1985, without regard to:
 - Changes in individual libraries
 - Changes in lending patterns
 - Population shifts across the state
 - Changes in formats
 - Uses of technology in resource sharing and ILL
 - Library director and staff knowledge and familiarity with the program
3. Resource libraries found their collections becoming unbalanced and out of the normal ranges for a public library, with large numbers of holdings in the individual Dewey areas of emphasis. While overall this may have benefited the state, in many cases it did not serve the local community’s needs appropriately.
4. Accountability and oversight were never fully implemented, and eligibility was never cut off for any resource libraries due to lack of compliance. Oversight was very basic, and consisted mainly of verification of expenditure of funds and basic reporting on purchases.
5. Nearly 50% of the total funds each year were distributed to the 4 largest (major urban) libraries in Kansas – Johnson County, Wichita, Topeka/Shawnee County, and Kansas City (KS).
6. A number of resource libraries failed to meet maintenance of local funding support for collections, and filled less than 25% of requests received.

Changes in ILDP

From 1986-2005, the program remained relatively the same with only small changes to the competitive grant program and a limited venture into the purchase of e-books using ILDP funding. In 2005, State Librarian Christie Brandau proposed that ILDP funding be used to initiate a resource sharing project of digital audio books and music. \$50,000 was diverted to establish *Audiobooks, Music and More*, with libraries adding to the virtual collection with local funds.

ILDP Resource Sharing Task Force

An ILDP Resource Sharing Task Force was appointed following a statewide summit to present and discuss issues related to the program. See Appendix D for a list of Task Force members. The group was charged by State Librarian Christie Brandau to:

- Review the history of the program
- Analyze the use of funds over the lifetime of the program
- Create a 21st Century mission for the ILDP funding
- Develop recommendations for future use of ILDP funding

ILDP Task Force Recommendations

The Task Force recommends that the mission of the ILDP be to facilitate resource sharing and provide access to all types of library resources for residents of Kansas by supporting the purchase and delivery of materials.

The ILDP Task Force recommended a phased approach to changing the program in order to address the inequities, while giving the former recipients time to adjust. By 2011, the ILDP will be replaced with a new program that is more inclusive and that meets new needs and demands of resource sharing.

FY 2010 recommendation, interim for 1 year:

- Implement pilot program for courier = \$250,000
- Continue OverDrive program = \$100,000
- Remaining \$250,000 be allocated to the resource libraries and top net lenders with \$2,000 for each of the net lenders and then remainder to be allocated to resource libraries for one year
($\$2000 \times 27$ net lenders = \$54,000; approximately \$200,000 to be divided per resource sharing formula among 23 Resource Libraries = 43% of FY 2009)

Work groups have been appointed to develop the Courier Delivery Service Pilot Program and the Resource Sharing Program.

FY 2011 recommendation:

- Complete discontinuation of grant program to resource libraries, net lenders and competitive grants
- Continue/ expand Courier Delivery Program = \$250,000
- Continue OverDrive Program = \$100,000
- Implement Resource Sharing Program of \$250,000 (amount to be determined by state budget allocation)

Providing outstanding library service to Kansans remains the goal of the program, and we will be closer to reaching that goal with the recommended modifications.

APPENDICES

- A. ILDP Fund History 1986-2009
- B. ILL Stats 2002-2006, Top 50
- C. Resource Libraries 1982-2006
- D. ILDP Task Force Begins Work

APPENDIX A

Fiscal Year	ILDLP	Dollar Amount	Percent Change
1986	\$600,000		
1987	\$598,500	(\$1,500)	-0.25%
1988	\$400,000	(\$198,500)	-33.17%
1989	\$600,000	\$200,000	50.00%
1990	\$650,000	\$50,000	8.33%
1991	\$638,625	(\$11,375)	-1.75%
1992	\$625,637	(\$12,988)	-2.03%
1993	\$650,000	\$24,363	3.89%
1994	\$619,381	(\$30,619)	-4.71%
1995	\$619,381	\$0	0.00%
1996	\$619,381	\$0	0.00%
1997	\$619,381	\$0	0.00%
1998	\$619,381	\$0	0.00%
1999	\$619,381	\$0	0.00%
2000	\$693,090	\$73,709	11.90%
2001	\$684,659	(\$8,431)	-1.22%
2002	\$684,659	\$0	0.00%
2003	\$670,966	(\$13,693)	-2.00%
2nd cut/Aug	\$657,547	(\$13,419)	-2.00%
2004	\$624,670	(\$32,877)	-5.00%
2005	\$624,670	0	0
2006	\$624,670	0	0
2007	\$624,670	0	0
2008	\$624,670	0	0
2009	\$624,670		

APPENDIX B

Note: grayed areas indicate Resource Library

Top 50 Interlibrary Loans Sent

Kansas Public Library Statistics

			<u>2006</u>	<u>2005</u>	<u>2004</u>	<u>2003</u>	<u>2002</u>	<u>TOTAL</u>
1	Johnson Co	NE	150,681	130,516	100,808	117,269	107,441	606,715
2	Olathe	NE	142,576	128,519	104,452	71,084	70,484	517,115
3	Topeka	NE	12,805	9,096	10,206	12,903	8,905	53,915
4	Iola	SE	8,842	9,525	9,954	10,654	11,109	50,084
5	KCK	NE	3,249	8,271	9,084	8,265	9,774	38,643
6	Hutchinson	SC	6,903	5,976	6,903	9,222	8,895	37,899
7	Wichita	SC	7,176	6,960	6,294	6,355	5,924	32,709
8	Lawrence	NE	5,668	4,873	4,749	4,324	3,048	22,662
9	Coffey Co	SE	2,527	2,483	3,586	3,267	4,373	16,236
10	Manhattan	NC	2,616	2,693	3,054	2,757	2,798	13,918
11	Salina	C	3,086	3,453	1,552	2,683	2,699	13,473
12	Finney Co	SW	3,424	2,243	4,753	1,444	1,486	13,350
13	Leavenworth	NE	3,328	3,495	1,887	2,396	1,884	12,990
14	Atchison	NE	8,291	1,111	1,073	887	1,294	12,656
15	Derby	SC	3,651	2,693	2,574	2,343	1,313	12,574
16	Dodge City	SW	1,667	1,810	1,958	2,814	3,550	11,799
17	Emporia	NC	2,204	2,126	1,897	2,061	1,414	9,702
18	Kearney Co	SW	3,085	2,112	1,945	1,214	1,341	9,697
19	Newton	SC	1,735	1,773	1,821	1,727	1,639	8,695
20	Great Bend	C	1,379	1,763	1,885	1,492	1,340	7,859
	NWKLS	NW	1404	1511	1269	1495	1473	7152
21	Coffeyville	SE	1,203	1,628	1,211	1,552	1,476	7,070
22	Winfield	SC	1,347	1,471	1,562	1,216	1,291	6,887
23	Chanute	SE	1,385	1,205	1,064	1,575	1,206	6,435
24	Hays	C	1,053	1,288	910	1,459	1,547	6,257
25	Colby	NW	1,097	1,173	1,292	1,132	1,331	6,025
26	Pittsburg	SE	1,002	997	1,912	1,362	708	5,981
27	McPherson	SC	1,324	1,242	1,234	947	1,027	5,774
28	Liberal	SW	1,129	969	1,127	1,082	1,271	5,578
29	Parsons	SE	965	1,046	1,095	1,085	1,226	5,417
30	Andover	SC	1,316	1,216	927	1,018	890	5,367
31	LaCygne D2	SE	734	1,202	935	1,671	551	5,093
32	Augusta	SC	784	1,340	784	866	1,252	5,026
33	Stevens Co	SW	1,082	1,236	918	844	921	5,001
34	Fredonia	SE	777	717	729	1,441	1,034	4,698
35	El Dorado	SC	1,495	637	653	810	764	5,001
36	Winchester	NE	3,500	214	285	248	3	4,250
37	Hesston	SC	1,109	779	873	728	675	4,164
38	Arkansas City	SC	1,102	945	911	666	464	4,088
39	Meade	SW	583	804	839	1,033	689	3,948
40	Hiawatha	NE	643	1,100	638	674	796	3,851

41	Junction City	NC	1,020	806	726	921	283	3,756
42	Clearwater	SC	868	748	733	710	564	3,623
43	Douglass	SC	718	721	709	581	891	3,620
44	Lyndon	NE	2,708	258	220	179	167	3,532
45	Pott-Wab	NC	689	771	692	769	494	3,415
46	Girard	SE	962	689	558	575	535	3,319
47	Mulvane	SC	827	687	638	462	377	2,991
48	Ottawa	NE	1,048	590	519	426	366	2,949
49	Goodland	NW	616	657	504	582	483	2,842
50	Osage City	NE	765	679	439	224	261	2,368
51	Tonganoxie	NE	1,080	552	261	217	225	2,335
52	Louisburg D1	NE	945	709	524	138	0	2,316
53	Ft Scott	SE	830	686	541	10	10	2,077
54	Centralia	NE	1,419	319	105	101	0	1,944
55	Nortonville	NE	1,441	201	72	137	1	1,852
56	Hamilton Co	SW	481	306	340	245	458	1,830

APPENDIX C

Resource Libraries 1982-2006				2006	
	Amount expended on materials as a percentage of total budget			Total ILLs Filled	Percent of Requests Filled
	1982 %	1990 %	2006 %		
JoCo	16	22	12	153046	83%
Wichita	11	14	13	11315	45
TSCPL	14	20	11	16238	18
KCK	18	21	8	4589	13
Hays	28	26	17	1860	64
Lawrence	19	24	15	8150	22
Dodge City	19	16	11	2925	42
Emporia	12	14	12	3767	32
Great Bend	12	12	12	2150	56
Iola	20	15	15	3087	77
Manhattan	24	16	14	5177	42
Newton	18	16	14	3447	53
Pott Wab	15	22	15	1123	44
Coffeyville	17	22	15	2319	82
Finney County	22	14	9	4210	52
Hutchinson	17	15	20	8622	53
Junction City	25	16	14	2058	34
Leavenworth	25	17	15	4136	80
Liberal	25	13	13	2236	50
NWKLS	21	5	12	2063	76
Olathe	15	25	14	144486	88
Pittsburg	15	16	10	1681	50
Salina	24	18	11	5617	72

APPENDIX D

ILDP Task Force Begins Work

State Librarian Christie Brandau named the members of the ILDP Task Force recently. The group will work during 2008 to develop recommendations and possible models of service that can be brought forward to the Kansas library community.

Task Force members include:

Janet Anderson-Story, Flint Hills Technical College

Cynthia Akers, ESU WAW library

Mary K Bird-Guilliams, Wichita Public

PJ Capps, Atchison Public

Terri Cline, Kansas City KS Public and USD 500

Reta Graber, Hutchinson Public

Mary Markwalter, Coffey County Library *

*replaced by Ellen Rose, Coffey County

Joe McKenzie, Salina Public

Eric Norris, Hays Public

Emily Sitz, SWKLS, Dodge City

Laura Soash, Goddard, USD 265