RUSA STARS' 5 Things Every New Resource Sharing Librarian Should Know

5 Things Every New Resource Sharing Librarian Should Know

1. Guidelines & Laws
2. Technology
3. Customer Service
4. Assessment
5. Education & Networking

1. Guidelines & Laws

Many library resource sharing activities are guided, limited, and even made possible by federal laws – particularly those related to copyright and copyright exemptions. Core guidelines commonly adhered to in resource-sharing practices have grown out of these laws. Licenses and licensing agreements between libraries and library consortia and vendors supersede law, and should be familiar to resource sharing librarians. Knowledge of current laws and guidelines governing resource sharing can help librarians provide compliant, standardized services that enhance performance in their library's roles as both borrower and lender.

Best Practices

- As a borrower, follow the CONTU Rule of Five and do not request more than 5 articles from the last 5 years from a single journal title within a calendar year unless copyright fees are paid.
- As a borrower of copies and provider of local document scanning, comply with the U.S. copyright law (Title 17, U.S. Code) and its associated guidelines.
- Include a copyright notice of restrictions on copies provided to other libraries or your own patrons.
- Display a statement of copyright restrictions on material request forms.
- Work with the people in the library or consortium that negotiate electronic resource licenses to ensure there is nothing in them to prohibit lending the resources via Interlibrary Loan. Use a mechanism (e.g., a spreadsheet or a database) to track which subscriptions allow you to provide lending via ILL and those that do not.

Resources

- Interlibrary Loan Code for the United States (http://www.ala.org/rusa/resources/guidelines/interlibrary)
- Circular 21: Reproductions of Copyrighted Works by Educators and Librarians (http://www.copyright.gov/circs/circ21.pdf) (US Copyright Office)
- STARS Legislation and Licensing Committee (http://connect.ala.org/node/65155) provides updates on legislative and regulatory developments affecting libraries and resources sharing. (You may have to log in to ALA Connect to view.)
- First Sale Doctrine – U.S. Code Title 17, Section 109 (http://codes.lp.findlaw.com/uscode/17/1/109). This is what allows libraries to lend materials they acquire under any condition they choose. In other words, this makes library resource sharing of physical materials possible.
- CONTU (National Commission on New Technological Uses of Copyright Works) Rule of Five (http://old.cni.org/docs/infopols/CONTU.html) as presented by the Coalition for Networked Information
- Library Copyright Alliance (http://www.librarycopyrightalliance.org/) (LCA) – This is a great resource for current topics related to libraries and copyright including relevant cases wending their way through the U.S. judicial system. A document of current interest is the one on Costco v. Omega (http://www.librarycopyrightalliance.org/bm~doc/lcacostco013111.pdf). The LAC is also a great resource for information on treaties and international copyright affecting libraries.
- Copyright Clearance Center (http://www.copyright.com/)

2. Technology

Using technology to streamline your workflow and processes provides benefits to your organization and to your patrons. Using appropriate technologies saves staff time (and thus money), results in fewer errors, shortens patron wait times, and helps to integrate ILL processes with the rest of the library. This doesn't always mean you need to purchase the newest, most expensive product. Rather, aim for effective, efficient use of technology where it will have the most impact.

Best Practices

- Be familiar with technological offerings and tools
- Consider ILL management software either through your ILS or stand alone
- Use document transmission software
- Use all the features of your ILL system, such as custom holdings with OCLC
- Take advantage of tools developed by your colleagues

- Review your ILL automation annually
- Maximize technology whenever possible (e.g., be familiar with technological offerings and tools, use OCLC custom holdings, use DOCLINE routing tables, use ILLiad Odyssey trusted sender, take advantage of tools developed by colleagues, etc.)
- Implement an ILL management system (e.g., ILLiad, Clio, Relais) to manage ILL records for tracking and statistical purposes
- Provide adequate workstations for staff to access your ILS, OCLC, DOCLINE, Internet, and other electronic and bibliographic resources as well as for scanning and electronic transmittal of copies
- Network individual workstations to share ILL data, forms and other resources on a shared server/space
- Maintain up-to-date hardware and software
- Use state-of-the-art electronic methods to request items
- Use state-of-the-art technology to send copies electronically when possible
- Network with colleagues

Resources

The IDS Project Workflow Toolkit (http://toolkit.idsproject.org)
OCLC's WorldCat Resource Sharing Support (http://www.oclc.org/support/services/resource-sharing.en.html)
ShareILL's list of Systems, Software, and Standards (http://www.shareill.org/index.php?title=Systems,_software_and_standards)

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3. Customer Service

Having a strong customer service philosophy will make ILL easier and more pleasant for your patrons.

- Keeps patrons coming back to use interlibrary loan
- Makes the process smoother and easier for you and your staff
- More efficient and saves money

Best Practices:

- Use technology to save time and cost
- Have a fast turnaround time
- Reduce the amount of people through whom requests pass
- Promptly notify patrons when material arrives
- Make interlibrary loan policies and procedures easy to find and understand
- Be open to comments from patrons, listen to what works and what doesn't
- Focus on the preferences and needs of the end user
- Perform regular customer satisfaction evaluations

Resources:

IFLA Guidelines for Best Practices for Interlibrary Loan and Document Delivery (http://workflowtoolkit.wordpress.com/)

Leon, Lars E., et al. "Enhanced Resource Sharing Through Group Interlibrary Loan Best Practices: A Conceptual, Structural, and Procedural Approach" (http://kuscholarworks.ku.edu/dspace/handle/1808/5842) Libraries and the Academy 3.3 Jul. 2003 419-430

ALA's Professional Tips Wiki entry on Customer Service (http://wikis.ala.org/professionaltips/index.php?title=Customer_Service)

TED Talks (http://www.ted.com/), although not strictly library-focused, are a great resource for ideas & inspiration.

GiveMore Media (http://www.givemore.com/) is a for-profit company that develops & sells customer service training tools. They offer some great free videos to inspire.

Your patrons are your resources! Treat complaints as gifts!

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4. Assessment

Whatever name you use: quality measurement, program evaluation, benchmarking – the purpose of assessment is to help you make decisions about your library's services. Some decisions may be: what new services should be developed, what services need improvement – or, what should you stop doing completely? Assessment can be used to discover whether the quality, speed, price or quantities of the services your library provides are similar to other libraries of your type and size – or not.

Best Practices

Some of the most commonly measured or assessed ILL activities are as follows:

- Fill rate – how often does your department fill requests from borrowing libraries?
- Turn around time – how long do your patrons wait for a book or journal to be delivered? How long does it take your ILL department to respond to borrowing library requests?
- Cost studies – how much does it cost your department to loan a returnable item? A photocopy?
- User studies – who is using your ILL department? What academic group? Faculty? Graduate students vs. undergraduate? Is usage on the rise?   Are patrons happy with your services?
- What is being requested? What titles or types of materials are you being asked to borrow for your patrons? What titles or types of materials are you most frequently lending?
- Consortial borrowing statistics

Resources

- Association of Research Libraries (ARL) – www.arl.org (http://www.arl.org/)

- ARL's assesment blog (http://www.libraryassessment.info/)
- National Center for Education Statistics (http://nces.ed.gov/)
- Leon / Kress Resource Sharing Cost Study Database (http://guides.lib.ku.edu/Ressharingcoststudy)
- Journals:

    - Journal of Interlibrary Loan, Document Delivery & Electronic Reserve (http://www.tandfonline.com/toc/wild20/current)
    - Interlending and Document Supply (http://www.emeraldinsight.com/journals.htm?issn=0264-1615)
    - IFLA Journal (http://www.ifla.org/publications/ifla-journal)

- Market Research Studies:

    - The Primary Research Group (http://www.primaryresearch.com) publishes market research studies focusing on higher education – including academic libraries. Their 2009 study: Higher Education Interlibrary Loan Benchmarks (http://www.primaryresearch.com/view_product.php?report_id=293) ($89.00 for downloadable pdf) features a wealth of ILL data from almost 90 academic libraries in the U.S. and Canada for you to measure your department against.

- Checklists and "best practices" questionnaires.

    - Rethinking Resource Sharing "Checklist." (http://rethinkingresourcesharing.org/star-checklist-2/) This list of aggressive and forward-thinking questions will get you pondering how good your resource sharing practices really are – or will be in the future.
    - IFLA's "Guidelines for Best Practice in Interlibrary Loan and Document Delivery (http://archive.ifla.org/VI/2/p3/Guidelines_ILDD-en.htm)." This list is organized by lending library and borrowing library and will give you the opportunity to evaluate your practices against a list of key questions.

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5. Education & Networking

Education & Networking

Resource Sharing is a rapidly changing field requiring ongoing familiarity with a wide range of topics, from scanners and software to copyright law. Continuing education is key to gaining new skills, and to keeping up with changing trends and technologies. Likewise, networking with other librarians in the field allows Resource Sharing librarians to gain learn about changes, products, and trends. Networking also allows us to form personal relationships, key when you need a special request, a favor, or help finding that impossible to locate item.

Best Practices:

- Attend national and regional conferences
- Join relevant discussion lists
- Take advantage of webinars and other free or low-cost trainings
- Volunteer for a STARS Committee (https://www.ala.org/CFApps/Committee/volunteerform/volunteerform.cfm?) (you will have to log in to ALA Connect)
- Visit other ILL operations

Resources:

- ShareILL's list of ILL conferences (http://www.shareill.org/index.php?title=Conferences)
- Douglas Hasty's *Library Conference Planner* (http://lcp.douglashasty.com/)
- ShareILL's list of Discussion Lists & Blogs (http://www.shareill.org/index.php?title=Discussion_lists_and_blogs)
- STARS-Atlas Systems Mentoring Award (http://www.ala.org/rusa/awards/mentoring) (provides funding for a new ILL librarian to attend ALA Annual)
- Your resource sharing colleagues. Resource sharing librarians tend to be a friendly lot. Reach out to other resource sharing practitioners in your area with questions or requests for advice.

General Resources

ALA's Interlibrary Loan Fact Sheet (http://www.ala.org/tools/libfactsheets/alalibraryfactsheet08)
ShareILL (http://www.shareill.org/index.php?title=Main_Page) - the wiki dedicated to Interlibrary Loan.
ILL discussion lists (http://www.shareill.org/index.php?title=Discussion_lists_and_blogs)
Interlibrary Loan related journals (http://www.shareill.org/index.php?title=Publications)
OCLC's WebJunction Resource Sharing Community (http://resourcesharing.webjunction.org/1)

Have a favorite resource that isn't listed here? Tell us about it! (mailto:STARmembership@gmail.com)

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