



Reference and User Services Association

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## **Guidelines for Resource Sharing Operations Management**

### **History**

Originally prepared by the Task Force for Qualifications for Interlibrary Loan Operations Management which was convened by the RUSA STARS Executive Committee, 2006. Revised by the Codes, Guidelines and Technical Standards Committee, Sharing and Transforming Access to Resources Section (STARS), Reference and User Services Association (RUSA), 2009. Submitted to the RUSA Standards and Guidelines Committee on June 14, 2010 with revisions after feedback from interested parties (primarily via the STARS-L listserv) and with approval of the STARS Executive Committee. Revised by the Codes, Guidelines and Technical Standards Committee, Sharing and Transforming Access to Resources Section (STARS), Reference and User Services Association (RUSA), 2010. These guidelines were approved by the STARS Executive Committee on Feb 14, 2011 and by the RUSA Board on January 23, 2012. *Revised by the Codes, Guidelines and Technical Standards Committee, Sharing and Transforming Access to Resources Section (STARS), Reference and User Services Association (RUSA), 2022; approved by the STARS Executive Committee, November 18, 2022.*

### **Purpose**

The purpose of this document is to:

- 1.) Make recommendations regarding the qualifications needed for Resource Sharing Managers;
- 2.) Recommend guidelines for hiring, training, and maintaining the skills of Resource Sharing Managers;
- 3.) Provide supporting documentation for libraries exploring and/or questioning the need for library professionals in resource sharing.

Traditional Interlibrary Loan (ILL) and Document Delivery (Doc Del) services are expanding into a larger resource sharing role. Increasingly, staff managing these operations are responsible for performing functions related to collection development, instruction, reference, and becoming an initial patron point of contact. With these additional roles, libraries are encouraged to support the “Rethinking Resource Sharing Manifesto” (<http://rethinkingresourcesharing.org/>) that outlines a set of principles advocating the improvement of discovery and delivery workflows and policies.

A purpose of providing RUSA guidelines for Resource Sharing operations management is to ensure that those involved in the management of these areas have the appropriate professional and personnel skills. Management personnel need to have core supervisory and project management experience, both of which are crucial for this area. The skills and experience recommended in these guidelines may be held by more than one person, and some daily job duties may be performed by paraprofessionals rather than librarians, but those in the operation should ultimately report to a librarian.

Skill sets recommended come predominately from previous management experience, although some

of the daily job responsibilities could be learned on the job. Additionally, management personnel should be committed to tracking and influencing issues and trends in the field of resource sharing on local, regional, and national levels, and then implementing changes in their own operations.

These guidelines focus only on the management of interlibrary loan and document delivery operations, and are designed for all types and sizes of libraries.

## **1.0 Basic and technical qualifications for Resource Sharing Managers**

### 1.1 Knowledge of ILL community guidelines

1.1.1 ALA ILL Code/Supplement

1.1.2 Relevant Network and Consortial Agreements

1.1.3 IFLA International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure

### 1.2 Knowledge of applicable federal, state, and local laws, policies, and regulations

1.2.1 United States federal copyright statutes (e.g. sections 107, 108, 109, 121, 121a)

1.2.2 Patron privacy

1.2.3 Accessibility

### 1.3 Training and experience in bibliographic searching.

1.3.1 Knowledge of research databases and other tools for citation verification.

1.3.2 Knowledge of standard aids for locating requested materials.

1.3.3 Knowledge of publication processes and item availability.

1.4 Skill in promoting and contributing to a community of sharing and reciprocity, both within a library and between libraries.

1.5 Knowledge of (or ability to gain knowledge of) ILL and Doc Del technology for maintaining and improving workflow, upgrading hardware/software, and enhancing current services to patrons.

1.6 Thorough understanding of the essential components of consortial agreements, including but not limited to turn-around time, prioritization, loan periods, fees, and other commitments typically made by the home institution and its partners in these agreements.

## **2.0 Supervisory skills needed for effective management of Resource Sharing operation**

The manager must:

2.1 Have the ability to provide leadership in management, developing employees, and excellent customer service.

2.2 Promote an inclusive environment and make decisions to ensure a diverse and equitable workplace.

2.3 Have the ability to effectively coordinate daily operations of ILL and Doc Del services and to develop workflow for the provision of fast, cost-effective, and seamless services.

2.4 Have the ability to work collegially with other groups within and outside the library on issues that directly impact interlibrary loan and document delivery services.

2.5 Possess the ability to manage the interlibrary loan/document delivery budget which includes but is not limited to shipping, copyright, borrowing/lending invoices, ILL fee management (IFM), capital equipment, and technology costs.

### **3.0 Qualifications for strategic management**

The manager must:

3.1 Possess knowledge of trends and technology at the professional level in the Resource Sharing field, including licensing agreements and their restrictions, accessibility issues (e.g. WCAG webpage compliance, OCR PDFs), request-management databases, software upgrades, copyright compliance issues and trends, consortia, and resource-sharing developments. Staying current with Resource Sharing trends is fundamental to providing efficient service.

3.2 Understand the institutional priorities and the service environment in which the department operates.

3.3 Have knowledge of consortial agreements sufficient for evaluating them and recommending participation for the enhancement of patron services.

3.4 Advocate for new technologies that support institutional priorities.

3.5 Know how to collect and evaluate quantitative and/or qualitative data in order to improve resource sharing operations and services.

3.6 Possess the ability to evaluate and recommend consortia and commercial agreements.

### **4.0 Education and continuing education for Resource Sharing Management**

4.1 Oversight of Resource Sharing operations should be assigned to personnel holding a graduate degree in library or information science, OR equivalent education and experience for understanding of the research processes, workflow efficiencies, project management, and fiscal operations.

4.2 The manager should participate in professional organizations to stay current with trends in resource sharing activities and to form personal networks.

4.3 The manager should participate in continuing education opportunities, such as resource-sharing-specific conferences, courses offered by vendors, or continuing education courses focused on management skills.

4.4 The manager should advocate for ongoing professional development opportunities for staff development/training.

4.5 The manager should advocate that library schools offer courses in resource sharing to better prepare graduates who enter this field.

### **Definitions**

**Resource Sharing** includes interlibrary loan and document delivery in collaboration with shared

catalogs, consortial lending, shared print collections, and collaborative collection development.

The purpose of interlibrary loan as defined by the American Libraries Association Interlibrary Loan Code and Explanatory Supplement (revised 2016) is the process by which a library requests material from, or supplies materials to, another library. The ILL Code and Supplement documents may be found on the [ALA RUSA website](#).

**Document Delivery** includes any service, locally or at a distance, that involves sharing a library's own collection with its own patrons, without requiring patrons to visit the library, such as delivering articles or mailing books directly to patrons' homes.