Welcome to Spinning Plates: Managing Resource Sharing Operations. I am pleased to be here with you today to cover all of the whirling aspects of resource sharing!
Now that you have an idea about spinning items that are rotating at the same time, I am going to take you through the major elements of interlibrary loan/resource sharing. First, it is best if you participate in agreement with other libraries. To that end, ALA RUSA STARS established the ILL Code of the United States many years ago. This code has been updated many times and is currently being reviewed. Some salient points of the code include a definition, a purpose, the scope, responsibilities of the borrower, and responsibilities of the lender. It is assumed that if you participate in this ILL, then you will abide by the code. Similarly, the International Federation of Library Associations (IFLA) also has a code for international ILL. It is very similar to the US code. These codes ensure that all libraries that participate have the same expectations. Not all libraries follow these rules but they should. It is the only way that libraries will safely share materials.
One of the most difficult pieces for me to learn was Copyright. I knew that we needed to make payments but did not have all of the particulars. Later, I learned of the five for five rule. This is part of the Contu Guidelines. Other countries follow laws and do not necessarily refer to guidelines. You need to track this information so that you are in compliance. A system like ILLiad has the capability of tracking and making payments to the Copyright Clearance Center. It is also helpful if you watch the developments of lawsuits. Following pending cases can be enlightening.

Licensing may or may not be in your hands. Know what your library arranges. We have an Electronic Resource Management (ERM) that helps us to track our electronic journals to determine if we can lend from the titles. Be aware of some exceptions that you may encounter. There is one e-journal publisher that has stipulated that you can only supply to borrowing libraries in your own country. This means no lending over borders.

Also important to be aware of is any law reforms that may be on the horizon. The Digital Millennium Copyright Act is a piece of legislation that involves digital rights management and copyright infringement on the internet. Something that we are all familiar with today.
At MSU, we do not generally have direct “in person’ public contact but many libraries do. We do take phone calls and respond to e-mails (and there is the occasional patron who is brought back to our unit for further assistance). We work on any problem solving that needs to be done. Talk to patrons with overdue materials. Change passwords for those who do not recall their password. We make sure that staff have enough time with the various processes before they are able to respond to patron questions.

Public Relations, while not as important as other areas, gives is helpful when establishing a new service. When we first brought up ILLiad, we did such a thorough job in PR that patrons thought that ILLiad was the only service that they needed to know about. Again, we offered a new service of supplying scans from our print materials to faculty, graduate students and staff. We named the new service MARS. We used your usual PR avenues to get the word out. These tools can also help with disseminating news that updates patrons on the various services provided.

While it is critical to keep a connection with your patrons, it is equally important to develop and maintain cordial relationships with interlibrary loan/resource sharing partners. You may be in a consortium or in a special relationship with a library and you need to keep those relationships in good health.
So, how do patrons learn about items that they may want and where do we look for these items. All important aspects of resource sharing. Patrons may find their citations through the various electronic databases and the OpenURL capabilities allow that citation to move to a requesting system seamlessly. The newest craze is discovery platforms. These allow patrons to use a single box query to discover the research that they need. There are various platforms for discovery including III’s Encore, Summon, Primo and EbscoHost to name just a few. These platforms can be set up in various ways and connect to requesting systems differently. While it is important for patrons to know what they need, it is equally important for us to find what they want. OCLC and Docline are information utilities that assist ILL departments in determining that information and providing a method to pass the request to lending libraries. There is another way to do this as well, through union catalogs. These catalogs may be a physical manifestation or a virtual system that uses a standard to collect the information. An example of this would be the OhioLINK, Ohionet and MeLCat. All of these systems come with separate systems, processes, standards and policies unique to the group.
A number of years ago, we discovered that it was difficult to track requests. We looked for a solution and found ILLiad. This interface was robust enough for the volume that MSU produces in requests. Another similar program is CLIO. MSU used this program before ILLiad but did not find that it was able to handle the transactions that we sustained. It does a very nice job for many libraries though. Relais, a system created by a Canadian group, allows libraries to manage requests, interacting with OCLC and other services. InnReach is an Innovative product used by MeLCat libraries and OhioLink. It is based on a Union Catalog. Likewise, ArticleReach is a similar product for articles that was developed by Innovative and it is used by the ArticleReach Direct Consortium (a group of international libraries). OCLC WorldShare has many aspects that cover the gamut of library technology. Their ILL subsystem has been used for many, many years. Docline is a union database provided by the National Library of Medicine that allows requesting and sharing of items. Rapid is also a union catalog that is run out of the Colorado State University, it promotes seamless requesting of articles and has more recently branched out to cover book chapters and books. We also have hybrid systems, Uborrow is one of these systems. It uses Relais D2D discovery with ILLiad back end.
Statistics and Assessment

• Types of statistics
  – OCLC
  – ILLiad or any other ILL software
  – Borrowing, Lending, Document Delivery, Distance Learners, etc.

• Assessing programs and services
  – Surveys
  – Focus Groups
On to the next plate! Staff!! As a manager of interlibrary loan/resource sharing you will need to consider staffing levels and assistance. At MSU, I have 8 FTE of regular staff and numerous hours of student time. You may also need to use volunteers depending on your situation. Some libraries are fortunate enough to have librarians but that does not always happen. If it is a small operation, there may be the one staff person who does it all. Training of staff needs to be considered as well. Perhaps there is consortial training that is available. We do have that with MeLCat. Other services provide training. OCLC has many, many opportunities for training. As do the other programs and services listed.
Another plate to whirl is delivery. How do we move the materials?!! The most recent movement is to online delivery of articles. This means scanning articles to a file and sending or using print to file in the case of e-journals. ArticleExchange makes this easy for Worldshare libraries. RapidX was created to send articles by the Rapid developers. Odyssey can be used through ILLiad or as a standalone. Some libraries still use Ariel but it is best if they discontinue that program. It has not been updated since about 2006. Finally, DropBox can also be used if you are not a member of one of the other services. One of the things that I never thought to be involved with is trucking but this does happen in resource sharing when you have physical items to ship. There is a time to use all of the various commercial services like USPS, UPS, FedEx and DHL. USPS has a book rate which is reasonable but tracking is not an option. If you need to track the shipment, then it is best to use UPS, FedEx or DHL. Often, libraries can get a better rate if they work through larger body. For example, a university may have a relationship with one of the services that provides a discount. Finally, consortial arrangements for delivery may be part of the overall system. In Michigan, we have RIDES which is administered by MCLS with the trucking company ProMed. Other systems use other couriers.
Another critical aspect of interlibrary loan/resource sharing is the equipment that is being used. Since all libraries have PCs, this is not usually a surprising expense but the manager needs to be aware of the programs that need to be used and the compatibility. If you have an IT on staff, that helps but if you do not, it is good to have some experience with the equipment.

If you are supplying articles through scanning, then you will need to be aware of the different scanners available and their capabilities. We have had requests for certain DPI scans that require special handling. Also, if there is a need for color scans, that can change the fulfillment of the request.

Something to consider is the use of smart phones for scanning. This can be accomplished through apps that are available for the various smart phones. Rather than bringing the book to your unit, you may want to scan in the stacks. Apps can make that a possibility.
Finally, the last plate to spin for today, Accounting. Many libraries do not charge. We do. If we did not, we would probably not be able to keep up with the demand. One of the easiest ways to handle this is electronically. This can be done through OCLC IFM or Docline’s EFTS. If it is not possible to do this, then we issue invoices. This means following established office procedures and preparing for audits. On the other side of this is our payments for borrowed items.
Sources of Information

• Consortia
• ALA
  – RUSA STARS (Sharing and Transforming Access to Resources Section)
  – ACRL RMBS (Rare Books and Manuscripts Section)
• IFLA
  – Document Delivery and Resource Sharing Section
• Share-ILL (www.shareill.org/)
Questions?