Description of Staffing, Continuing Education and ILL Budget

The table below provides summary data for the titles of the department head(s), titles and numbers of support staff and number of student assistants (when specified by the participant). Two of the participants identified themselves as professional librarians as part of their titles, one as an Access Services Head, one as Head of Resource Sharing and Document Delivery, with the remaining participants designating non-librarian titles with supervisory responsibilities. Most of the departments reported relying on student assistants for pulling and scanning materials and other tasks. Specific duties of department heads and staff are reported in detail in each case study.

University/College	Department Head(s)	Staff	Student Assistants
UT Arlington	ILL Manager	Library Assistants (5)	Student Assistants (5)
Tulane University	Head, Circulation and Interlibrary Loan	Library Technicians (3)	Student Workers (2-4)
University of Minnesota	Head, Interlibrary Loan, Borrowing (1), Library Manager, Lending (1)	Library Supervisor (1), Library Assistants (6.5)	Student Assistants
IUPUI	Interlibrary Loan Librarian	Interlibrary Services Senior Assistant (1), Interlibrary Loan Clerk (1)	Student Assistants (2.5-3)
Brigham Young University	Access Services Chair	Document Delivery Manager (1), ILL Supervisor (2), Document Delivery Supervisor (2), Copy Center Supervisor (2)	Student Workers (12.5)
University of Tennessee	Head, Resource Sharing and Document Delivery	Borrowing Supervisor, Borrowing Associates (2), Lending Supervisor, Lending Associate (1),	Student Workers
Colorado State University	Interlibrary Loan Coordinator	Borrowing Unit Head, Lending Unit Head, Support Staff (4)	Student Workers
Oberlin College	Interlibrary Loan Supervisor	N/A	Student Assistants (7)
Stony Brook University	Head, Interlibrary Loan and Business Librarian	Instructional Support Technician, Instructional Support Specialist, Library Clerks (3)	Student Workers

All of the interlibrary loan departments reported participating in formal and informal continuing education, both at the department head level and support staff level, when applicable. Examples include attendance at annual ILLiad conferences; regional resource sharing conferences sponsored by networks and consortia like TexShare, GWLA (Greater Western Library Alliance) and the MINITEX Library Information Network; and national ALA conferences.

Budget information varied in terms of annual costs and the budget categories presented by participants. Budget information is best interpreted contextually by the size of the library, volume of business, and local budget situation and is not easily summarized. Readers should refer to each case study for budget information.

Software and Automation

The libraries participating in the study universally use the OCLC ILLiad client as their automated system (the CSU Libraries report using ILLiad and Relais) to meet their resource sharing needs. All of the libraries use ILLiad to deliver articles electronically (either using Odyssey or posting Ariel/scanned PDFs) to their constituents. With its variety of applications to support and facilitate resource sharing, ILLiad has become the preferred standard for interlibrary loan departments among academic (and public) libraries. Several of the participants reported using ILLiad enhancements, such as Web Circulation, Odyssey Helper, and Trusted Sender. Others reported using the DOCLINE® and Rapid services with the ILLiad interface to request materials. Participants reported positive comments about using ILLiad and expressed overall satisfaction with the client.

Resource Sharing Consortia

Resource sharing consortia (or networks or systems) play an integral role in interlibrary loan services for all of the libraries surveyed. All of the case study respondents participate in more than one consortium, and all of the libraries report using consortia as their primary resource for obtaining ILL materials. Major cost savings, exceptionally quick turnaround time, convenient courier services, access to extensive holdings from member collections, reduced subscription rates and excellent service (resulting in high user satisfaction) are just some of the key advantages cited by libraries for participating in resource sharing consortia.

Examples of consortia cited by case study participants include SOLINET (Southeastern Library Network), KUDZU (Association of Southeastern Research Libraries' ILL Services Program), The Oberlin Group, OCLC/RLG SHARES, RapidILL, UALC (Utah Academic Library Consortium) and other statewide library consortia. Participation in multiple consortia has clearly emerged as a key best practice for interlibrary loan departments in academic libraries.

Commercial Document Delivery

Perhaps as a result of the advantages of consortial participation, all of the departments reported relatively low use of commercial document delivery services. The ILL departments routinely obtain materials for low or no cost through resource sharing consortia before resorting to commercial document delivery suppliers. Departments will use these suppliers only in certain cases; for example, if the material is not available from other lending libraries, if the constituent needs a high quality color copy or an article preprint, or if the request is needed immediately. Some of the libraries also purchase material from document delivery suppliers to avoid paying higher copyright royalties when use exceeds the CONTU “Rule of Five” guideline. Libraries report using commercial services on a case-by-case basis and prefer to order from the least expensive service available.

Libraries participating in this study purchase material from Ingenta, the British Library, Harvard Business Publishing, CISTI, ASME, Sage, Informa, NTIS, Storming Media, InfoTrieve, the National Library of Medicine and other document delivery service providers.

Copyright and Licensing

Limitations in licensing provisions for lending articles from electronic journals emerged as a major issue facing the libraries participating in the study. Most of the respondents expressed concern over these limitations. They emphasized the importance of obtaining lending rights to electronic journal subscriptions to provide optimal ILL services for their constituents. All of the libraries reported proactive and aggressive attempts on the part of electronic licensing and collection development librarians to negotiate lending rights for electronic subscriptions. ILL department heads reported strongly supporting these efforts but played a limited role in licensing negotiations. Several libraries, including the Oberlin Libraries and BYU, mentioned taking advantage of memberships in consortia as leverage for negotiating rights with publishers and vendors. The CSU Libraries reportedly will not sign licenses unless ILL is allowed.

More than one participant noted the importance of electronic resource management systems to track and provide licensing information to ILL departments.

Institutional Repositories and Open Access

Surprisingly, institutional repositories (IR) and open access (OA) materials have not substantially impacted interlibrary loan services, at least not for the libraries surveyed. Most of the participants report the same or an increased volume of business, and most of the departments do not have a system for tracking these materials. Because of time constraints, most respondents do not routinely conduct special searches for institutional repository or open access materials as part of their workflows, and rely largely on OPAC holding information to determine if these materials are available to patrons. One participant, the University of Minnesota Libraries, noted an increase in this type of material located by its staff, and Tulane