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# **Guidelines for Interlibrary Loan Operations Management**

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.

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### Introduction

These Guidelines are a result of research conducted by the Task as /P AMCID 1n7 MCID 6xBga5u 4ductaskg

<u>http://rethinkingresourcesharing.org/</u>) that outlines a set of principles advocating the improvement of delivery systems.

The purpose of providing RUSA guidelines for interlibrary loan (ILL) and document delivery (Doc Del) services management is to ensure that those involved in the management of these areas have the appropriate professional and personnel skills. ILL and Doc Del operations management personnel need to have core supervisory and project management experience both of which are crucial for this area. The various 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 but some of the daily job responsibilities could be learned on the job. Additionally, management should be committed to tracking and influencing issues and trends in the field of resource sharing on local, regional, and national levels.

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 Definitions

- 1.1 The purpose of interlibrary loan as defined by the American Libraries Association Interlibrary Loan Code and Explanatory Supplement (revised 2008) 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 at the ALA RUSA website.
- 1.2 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 scanning or photocopying articles, or mailing books directly to patrons' homes.

## 2.0 Basic and technical qualifications for ILL/Doc Del Personnel

- 2.1 Training and experience in bibliographic searching.
  - 2.1.1 Knowledge of tools for citation verification.
  - 2.1.2 Knowledge of standard aids for locating requested materials.
- 2.2 Skill in promoting and contributing to a community of sharing and reciprocity, both between libraries and within a single unit.
- 2.3 Knowledge of ILL and Doc Del technology for maintaining and improving workflow, upgradin

### 5.0 Education and continuing education for ILL/Doc Del Management

- 5.1 Oversight of ILL and Doc Del operations should be assigned to personnel holding a Master of Library Science. This credential is desirable for the understanding of the research processes, workflow efficiencies, project management, and fiscal operations.
- 5.2 The manager should participate in professional organizations to stay current with trends in resource sharing activities and to form personal networks.
- 5.3 The manager should participate in continuing education opportunities, such as resource-sharingspecific conferences, courses offered by vendors, or continuing education courses focused on management skills.
- 5.4 The manager should advocate that library schools offer courses in resource sharing to better prepare graduates who enter this field.