Definitions

- **Resource Sharing** — Libraries collaborating to provide services to their users such as:
  - Interlibrary loan (ILL)
  - Remote circulation
  - On-site borrowing
  - Group purchasing/licensing, especially of e-resources
  - Reference/research assistance
  - Collection development
  - Remote storage

- **Resource Sharing Consortium** — Group of libraries that have entered into a formal agreement to provide services to each other’s users
  - Local to international
  - Same or different types of libraries
  - Same or different ILS(s) and/or resource sharing system(s)
  - Usually includes “preferred” ILL service: fast, lend items often non-circulating via ILL, often without charge

- **Interlibrary Loan (ILL)** — process by which a library requests material from or supplies material to another library, often without any special relationship between libraries

- **Unmediated or user-initiated ILL** — process by which ILL requests are sent directly to potential supplying library/ies without staff intervention at the requester’s ‘home’ library

- **(Cooperative) Remote Circulation/Direct Consortial Borrowing** — circulation-based request & delivery process in which users initiate requests, usually from a shared catalog or de-duped Z39.50 search result, that are routed directly to a consortium library that has an available copy.

- **Reciprocal Borrowing** — program in which library users have onsite circulation privileges at member libraries within a consortium

- **Returnables** — items such as books, microfilm, A-V material, that are usually loaned to another library and returned after use

- **Non-returnables** — items such as journal articles, book chapters or conference papers that are usually scanned or copied and supplied to another library for its user to keep

- **Wide array of increasingly sophisticated discovery & delivery tools**

- **Direct access to variety of e-resources**

- **More convenient ways to request items not available from the user’s ‘home’ library**

- **Better request & delivery methods among requesting libraries & document suppliers (libraries, publishers, other providers)**

- **Electronic delivery of non-returnables to end users**
Current Resource Sharing Landscape

- Increasing purchase of current imprints instead of borrowing
- Increase in digitization instead of lending
- Increasing direct/indirect delivery to requester, especially for distance education students & public library users
- Increasing international activity

Challenges

- Wide array of discovery, delivery, & requesting tools
  - Too many choices?
  - Different search interfaces
  - Different request interfaces
- Many systems don’t interoperate:
  - Internal: ILL, ILS, ERP, Shipping
  - External: OCLC, Docline, Commercial Suppliers
  - Document transmission systems: Ariel, Odyssey, Relais
- Collection space at premium challenge of timely delivery from remote storage
- Conflicting internal/external priorities, policies & procedures
  - Conservative collection managers
  - Shipping issues
  - Payment issues
  - Lack of availability/circulation status info

Key Standards

- Z39.50 (ANSI/NISO)
  - A client/server-based protocol for searching and retrieving information from remote databases, e.g., library catalogs
- OpenURL (ANSI/NISO Z39.88)
  - Supports context-sensitive linking via a link resolver between information sources (e.g., citations) and authorized library services such as e-resources containing the cited item and/or the option to place an ILL request for the item.
- ISO ILL Protocol (ISO 10160 & 10161)
  - Supports the interconnection of different systems for the control and management of ILL borrowing and lending transactions.
- NISO Circulation Interchange Protocol (Z39.83)
  - Supports the exchange of circulation data between systems in three application areas:
    - Self-service
    - Direct Consortial Borrowing
    - Circulation/ILL

Resource Sharing Systems

- Bibliographic Utilities: OCLC & Docline
  - ILL Management Software: e.g., ILLiad, Clio
- ILS-based: e.g., INN-Reach/Article Reach, Voyager
- Standards-based: e.g., AGent, Relais, VDX, URSA
- Consortium-specific: e.g., Rapid

Delivery Options

- Returnables:
  - USPS
  - National shippers: e.g., DHL, FedEx, UPS
  - Regional couriers: e.g., Lanter, Servoy
  - State or Local delivery systems: e.g., ARCHE, Illinois Library Delivery System (ILDS), Nylink LAND
  - Diplomatic pouch
- Non-returnables:
  - Ariel & Odyssey
  - PDF via Email
  - Fax
  - USPS, etc.
Payment Options

- Check
- OCLC ILL Fee Management (IFM)
- Electronic Fund Transfer System (EFTS)
- IFLA Vouchers
- Credit Card
- Bank wire transfers

ILL Service Costs

<table>
<thead>
<tr>
<th></th>
<th>Unmediated ILL</th>
<th>Mediated ILL</th>
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</thead>
<tbody>
<tr>
<td>Borrowing Unit Cost (mean)</td>
<td>$2.39-$14.70</td>
<td>$17.50</td>
</tr>
<tr>
<td>Lending Unit Cost (mean)</td>
<td>$3.27-$12.06</td>
<td>$9.27</td>
</tr>
<tr>
<td>Combined Unit Cost (mean)</td>
<td>$5.16-$26.76</td>
<td>$26.77</td>
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</tbody>
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OCLC Worldcat Resource Sharing by the Numbers

- Over 9100 member libraries + commercial document suppliers & publishers
- Over 10 million ILL requests in FY2008
- 63% returnables / 37% non-returnables
- Requests by library type:
  - Academic: 60% of borrowing & 66% of lending
  - Public: 27% of borrowing & 23% of lending
  - Other: 13% of borrowing & 11% of lending
- Fill rate: ?
- Turnaround time: ?

OCLC Worldcat Resource Sharing Highlights

- Custom Holdings
- Local Holdings info
- Direct Request
- Group Access Capability (GAC)
- Batch printing/updating
- ILL Fee Management (IFM)
- ISO ILL Gateway
- Request deflection
- ILLiad
- Worldcat.org
- Worldcat Local
- Worldcat Direct

Decline ILL by the numbers

- 3145 participating medical libraries
- 2.1 million requests in FY07
  - Most requests for non-returnables
  - Fill rate: 92.5%
  - Average turnaround: 24 hours
    - Rush: 8 hours
    - Urgent: 3.5 hours
  - 92.5% of non-returnables delivered electronically

Decline Highlights

- Request options:
  - Unique Key using PMID, NLM identifier, OCLC # or ISSN
  - PubMed direct ordering
  - LocatorPlus for ordering non-Medline titles via NLM catalog
  - Manual entry of bibliographic info
- SERHOLD detailed serials holdings module
- Customized routing tables
- Automatic load balancing
- EFTS payment option
- Loansome Doc
  - service for individual users of PubMed or NLM Gateway
Resource Sharing Consortia

- Borrow Direct
- EZ Borrow
- Rapid
- Information Delivery Services (IDS) Project

Borrow Direct by the Numbers
- Began in 1990 as CoPY Project, expanded in 2002
- 7 Northeastern academic libraries
- Systems: URSA & Voyager, III Innopac ILSs
- 137,500+ requests in 2008
  - Returns only
  - Fill rate: 94%
  - Turnaround time: 4 days

Borrow Direct Highlights
- Each library determines what is eligible for requesting
- End user searches & requests known items via BD web interface
- Immediate notification if “home” library copy shows available—request not processed
- System randomly selects from available copies
- Items not available via BD must be separately requested via ILL or other option
- Staff access requests via BD staff web interface
- URSA does not create brief bib record or hold in ILS in BD context (does in EZBorrow)

EZ Borrow by the Numbers
- Began circa 1999
- 62 Northeastern academic libraries
- Systems: URSA & local ILSs
- 163,500 requests in 2008
  - Returns only
  - Fill rate: 94%
  - Turnaround time: 4 days

EZ Borrow Highlights
- Each library determines what is eligible for requesting
- End user searches & requests known items via EZB web interface
- Immediate notification if “home” library copy shows available—request not processed
- System randomly selects from available copies
- Items not available via EZB must be separately requested via ILL or other option
- Staff access requests via EZB staff web interface
- URSA does create brief bib record and hold in ILS

Rapid by the Numbers
- Began in 1997
- 81 academic libraries & 3 document suppliers
- System: RapidILL
  - Web interface for lending
  - Interacts with Clio, ILLiad & Relais for borrowing
  - ISO & XML compatible
- 510,000 requests in 2007
  - non-returns only
  - Fill rate: 95%
  - Avg turnaround time: 16.7 hours
Rapid Highlights
- Members supply Rapid w/detailed holdings of serials eligible for requesting
- Can join pod(s) of like libraries, if applicable
- Users place requests as usual
- Requests with ISSN & year automatically route to holding library/ies via RapidILL system
- Other requests require staff search & send
- Automatic load leveling
- Incoming requests include local call no. & location info.
- Delivery by Ariel (working to add Odyssey)
- Service performance is monitored

IDS Project by the Numbers
- Began in 2004
- 35 academic libraries in NY
- System: OCLC ILLiad/OCLC WCRS
- 49,000+ requests in FY2008
  - Returnables: 25,000+
  - Non-returnables: 24,000+
- Fill rate: ?
- Avg. turnaround time:
  - Returnables: < 72 hours
  - Non-returnables: < 24 hours

IDS Project Highlights
- Building a “unified community of trust & support”
- End users search & request as usual
- Requests routed via OCLC Direct Request, if possible
- Z39.50 lookup from ILLiad gives staff holdings symbols & e-journal permissions info via eJournal Availability Server
- Multi-level Transaction Performance Analysis Module (TPAM)
  - Contractual performance standards
  - NO fees
  - Best Practices Toolkit available to all

IDS Transaction Performance Analysis Module (TPAM)

Emory Libraries Landscape
- Medium-sized research university with over 12,000 students and 800 faculty
- Five administratively separate libraries & ILL offices plus shared storage facility
- Collections of over 3.1 million volumes & 40,000 e-resources
- All use SirsiDynix Unicorn ILS, Ex Libris SFX link server, & locally-developed e-resources management system (ERM)
- Implementing Ex Libris Primo discovery & delivery system & Verde ERM

Emory Libraries ILL Landscape
- All libraries use OCLC & ILLiad/Odyssey
  - Health Sciences Library also uses Docline
- ILL borrowing requests processed in FY2008: 25,000
- ILL lending requests processed in FY2008: 58,000
Woodruff Library ILL Landscape
- 4.5 FTE staff & 2 FTE student assistants processed 16,000 mediated ILL borrowing requests and 34,000 lending requests in FY2008
- Borrowing:
  - Articles = 6368 (40%) / Loans = 9644 (60%)
  - Fill Rate: Articles = 81% / Loans = 90%
  - Turnaround Time = 7.12 days (?)
- Lending:
  - Articles = 14771 (44%) / Loans = 18924 (56%)
  - Fill Rate: Articles = 67% / Loans = 54%
  - Turnaround Time = 2.17 days

Woodruff Library Resource Sharing Consortia
- GETS (local)
  - No-charge preferred ILL service (uses ARCHE van delivery, below)
- ARCHE (local)
  - Reciprocal borrowing w/home institution ID
- GOLD (state)
  - No-charge preferred ILL service & partial reimbursement for lending
- SOLINE (regional)
  - Preferred ILL service—no lending fees for returnables, can charge for non-returnables
- ASERL (regional)
  - No-charge preferred ILL service
- OCLC/RLG Shares (international)
  - Preferred ILL service w/expedited delivery by shipper of choice
  - Onsite use w/home institution ID
  - Uniform lending fees now paid via IFM (previously net-lending reimbursement)

Woodruff Library ILL Service Enhancements since 2005
- ILL request option in SFX
- Supply almost all non-returnables electronically to our users
- Purchase current/recent imprints & inexpensive items rather than request via ILL
- Due date reminder notices
- Use e-journals to deliver Lending non-returnables when possible

Conclusion
- Resource sharing is alive and well in myriad variations
- Challenges are both political and technological
- Libraries, users, system developers and standards organizations need to work as partners to address the barriers that still remain to the delivery of highly effective information & document delivery services to all

Questions/Discussion
- Now?
- Later?
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