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8-2-2022

## Collective and Creative Learning to Enhance Interlibrary Loan

Lars Leon

*University of Kansas*

Carol A. Kochan

*Utah State University*

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### Recommended Citation

Lars Leon & Carol Ann Kochan (2022) Collective and Creative Learning to Enhance Interlibrary Loan, *Journal of Library Resource Sharing*, DOI: 10.1080/1072303X.2022.2100858

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Lars Leon & Carol Ann Kochan (2022) Collective and Creative Learning to Enhance Interlibrary Loan, Journal of Library Resource Sharing, DOI: [10.1080/1072303X.2022.2100858](https://doi.org/10.1080/1072303X.2022.2100858)

## Collective and Creative Learning to Enhance Interlibrary Loan

### ABSTRACT

The resource sharing community has a proud history of sharing knowledge through conferences, workshops, and online resources in support of training and development. People have enjoyed these opportunities and received various levels of benefit depending on access and whether instruction aligns with the methods they learn best. However, it is clear there aren't enough collective actions to meet the needs. We hosted a series of focus groups on training and development to find out from participants what has worked for them, what is still needed, how they learn best, and the types of training and information that will help them succeed. This is especially true as we work through a pandemic that has led to reductions in staffing for some as well as budget issues. Information gathered has helped us identify what the resource sharing community can do collectively. We need an interactive online resource that creates a next generation level of learning and sharing. Conferences, workshops, and other events also continue to be important and can be enhanced through shared utilization of this new online resource.

### KEYWORDS

Resource Sharing, Interlibrary Loan, Training, Personnel, Staff Development

### Introduction

The resource sharing community has a proud history of sharing both materials and knowledge. Throughout the years, knowledge has been shared via conferences, workshops, and online resources in support of training and development. These opportunities have provided a range of benefits although fall short of the overall learning opportunities needed to meet the demand. Informal conversations with colleagues in Fall 2019 were the inspiration to conduct focus groups to determine the need for shared training and resources as a community. Then the Covid 19 pandemic introduced additional complications. Three issues many libraries are facing include reduced budgets, lower staffing levels, and lost years of staff expertise due to

retirements. We were short of where we needed to be before the pandemic and, with these issues, can we make a collective difference?

As most libraries closed their doors in Spring 2020, virtual conferences, including some long running resource sharing conferences, provided free or reduced registration. Vendors introduced quick changes that helped, and most operations did what they could do to continue to share materials when collections were closed. Information gathered via our focus groups shows some possibilities. It's still challenging but we are energized by the ideas discovered in our research. These ideas presented will help us celebrate and use the shared expertise across the community that will ultimately increase shared learning.

## **Methodology**

Informal conversations with colleagues helped to develop the list of questions used in the focus group sessions. Once the questions were developed, we created our research plan and obtained IRB approval. The purpose of the focus groups was to learn more about: training sessions resource sharing practitioners found valuable; determine other useful types of training outside of day-to-day practices; determine how people best learn; learn about current shared resources; and ask what the community should do in the future to develop shared training resources.

Participants were recruited by sending emails to members who had been posting to the ILL-L listserv, and to various consortia. Once participants indicated interest in participating, we sent links to a Qualtrics survey that asked the type of institution they represented, how long they had been working in the field, and their availability for focus group times. There were seven focus groups leading up to the September 2020 Northwest Interlibrary Loan Resource Sharing Conference. We presented preliminary focus group results at the conference and gathered

additional feedback from attendees. After the conference, we determined we needed input from a wider audience, so we scheduled two additional sessions.

We had thirty-one participants across our nine virtual focus groups including law and medical attendees. Most were academic along with two government, three public, and one consortia office colleague. We had around 150 attend our conference session which helped us affirm some information gathered and identify additional areas to consider.

### **Environmental**

Even with all the technology involved with interlibrary loan, it's the people who are key to providing excellent service in a collaborative way. That makes our most critical impact staffing levels and knowledge. Focus group participants spoke to limited time for training, limited oversight of trainees, and challenges related to remote only training. Some respondents also commented on reduced staffing levels including lost knowledge and expertise that needs to be replaced.

Focus group participants appreciated the opportunities to “connect” with others virtually to learn ideas that led to improvements in their own workflows. Many also spoke about how much resource sharing departments depend on each other to be successful and felt engagement is vital for the community. They spoke to the importance of being able to rely upon each other. Getting to know each other in various ways can increase our ability to collaboratively work together to solve issues and problems. It was noted that it was nice to see we are not in this alone. At the same time, some missed the opportunities afforded through in-person conferences and workshops.

## **Focus Group Questions**

***Describe a successful type of training and/or development that you have taken and tell us why it was useful.***

Focus groups participants provided examples of successful training on various systems, resource sharing policies and practices, skills that help improve personal knowledge and ability to be productive and better leaders. Also important were shared resources that people could access to learn more about various topics.

Many comments were related to specific systems. Some participants specifically talked about how extremely valuable their on-site ILLiad training was when they were first setting up their systems. The online videos and documentation available from Atlas Systems, developer of ILLiad, were also noted as helpful in maintaining the skills learned at the initial training, and to learn new uses for the software. Alma was recognized for providing a combination of useful readings and video tutorials. The IDS training sessions and conferences were much appreciated by some attendees.

Training on practices, and policies related to resource sharing were of great interest to focus group attendees. Those newer to the field mentioned they found courses related to the basics of interlibrary loan to be quite valuable. It was both an opportunity to get a sense of the bigger picture as well as to meet other professionals from diverse types of libraries. Several examples given of direct benefits of these courses mentioned were the acquiring the ability to fill requests and understand expectations of patrons and other libraries.

Some focus group participants wanted to better understand copyright and appreciated when experts in the field provided alternatives to the CONTU Guidelines. While many have had training on copyright, they felt it was a complicated issue with many nuances and that more

training was always beneficial. Some resource sharing practitioners mentioned that courses on “Extreme Bibliographic Searching” were very valuable to those in the field. This type of training helped them learn to identify difficult citations, including hard to find gray literature, and increase fill rates.

While training specifically related to resource sharing is quite valuable, we also heard from some about various trainings that were highly beneficial in helping them perform better. Others mentioned that training related to dealing with difficult patrons was highly valued by staff in their libraries. Library carpentry training on specific tools related to data management were noted as useful including classes that were online and exercise based. There are some opportunities for resource sharing practitioners to find training that is suitable to expand their knowledge beyond library systems. Many are sponsored by national, regional, and state library organizations. We need to make it easy for everyone to discover these opportunities. Learning about taking risks and learning to grow as a professional is important so that practitioners can develop new projects, services, and ideas. “Learning to Fail”, sponsored by the Utah Library Association, is an example of behavioral skill enhancing workshop.

***What other skills are important that you haven’t spoken to in your previous answers?***

Common themes that emerged were flexibility, customer service skills, curiosity, problem solving, attention to detail, persistence, and excellent communication skills. These skills are just as important as technical skills.

Flexibility was the most often mentioned behavioral skill that was needed to be an effective interlibrary loan practitioner. Over the years sharing practices and policies have continued to evolve as we strive to provide better services to patrons. Staff that are resistant to change might have a difficult time feeling comfortable in these positions. Flexibility has also

been a key skill during the pandemic when libraries had to swiftly change policies and procedures.

Customer service and communication were also considered to be important. Resource sharing staff process requests for their patrons which are vital to research, scholarship, skill learning, recreation, and more. Some items are difficult to get or might take longer to arrive than a patron would like. Diplomacy, listening and being able to convey concern can go a long way in diffusing tense situations. Both LinkedIn Learning training as well as locally provided workshops on customer service and communication were mentioned.

Many interlibrary loan requests are straight forward citations and easily ordered and acquired, while other requests are lacking the correct citation, are for conference proceedings, gray literature, or other difficult types of materials to locate. Those requests take detective skills, persistence, and curiosity to track down. Possessing these skills lead to higher fill rates and happier patrons.

Many of our focus group participants were supervisors of staff and students and mentioned that leadership training was personally important to them. Both leadership training provided in-house as well as those from multiple national organizations were mentioned. Learning to lead and empower staff is vital to creating an effective work environment. One person mentioned liking to use the Fish Philosophy to motivate staff (Lundin et al., 2021). This program helps managers motivate their employees.

Communication is also highly important. One person specifically mentioned that they used the Liberating Structures practices to help staff feel included and engaged in the workplace (Lipmanowicz & McCandless, 2014). While communication was mentioned as a vital skill, trainings were informally provided to staff upon hire.

***Tell us about any shared resources that help you with Resource Sharing (ILL). How do you use those resources?***

Survey respondents commented on a wide range of shared resources they valued having access to. They appreciated various vendor specific system documentation and training videos that are accessible. This included both content free to access and others that were accessible for a fee. A number spoke to how this information was especially useful in training new staff on their systems.

Many spoke to a variety of internal resources they have created in their libraries to provide shared access to useful information. This includes in-house wikis, private help lists, and shared videos. Several spoke of how sharing information was expanded to their consortium such as having a “circle of friends” to help with getting answers quickly on something new or to trouble-shoot an issue.

Several different resources available openly via the internet were referenced. Videos are also increasingly being created and shared via YouTube. The new *ILLers Facebook* group was mentioned as a useful source for those that use Facebook. Multiple people recalled how useful the now defunct ShareILL website was. ShareILL was created by Linda Frederiksen and Mary Hollerich as a platform for community members to contribute content including finding aids, staying current, managing your ILL operation and more (New World Wide ILL wiki, 2007).

***How do you best learn?***

Responses covered a range of methods with most focus group participants expressing a preference for a hands-on learning style. Some of these respondents noted they would like someone to walk them through the training while others prefer to just have someone available to



ask questions as needed. More people expressed interest in some type of visual instruction materials including videos. A smaller number preferred written instruction material in support of these efforts. One noted they were an auditory learner and preferred hearing a lecture first.

Focus group participants spoke about what conditions helped them best learn. Support provided by library administration, teammates, and peers were important. They appreciated support for their time spent learning and practicing. They appreciated some colleagues supporting the principle that they wanted to develop themselves.

The timing of the training opportunity was important. There are some types of learning that worked best when the need to learn was that specific moment in time to help with an issue. Project-based learning that one can do over a period of time was also important.

Many respondents gave various ways they used to retain the information learned from workshops or presentations. Learning in small periods of time and having to solve something helped such as taking quizzes or having a breakout room opportunity. Having something to practice and develop muscle memory through repetition was noted as important by some. Several spoke about how teaching others what was learned helped them better retain the information themselves.

***What else can the resource sharing (ILL) community do on large scale?***

Focus group participants were very complimentary of conferences that were able to continue online. A number spoke to how more staff were able to attend conferences compared to when they were in-person. One of our focus group participants mentioned that she was able to reach over four hundred conference attendees in her session presentation and had a lot of follow up questions and comments. Even as free or low-cost registration led to high virtual attendance

some noted it reduced informal networking that is often seen at in-person conferences. As time progressed conference sponsors tried creative methods to encourage networking by introducing virtual event centers where people can create avatars and mingle virtually, or other platforms that support virtual gatherings. These seemed effective and should continue to be developed. The ability to access content after the conference, whether one was able to attend or not, was seen as very useful.

Some spoke to the importance of online courses and workshops. These were seen as helpful both to current staff as well as experienced staff depending on the type of session. Many interlibrary loan operations have limited staffing and these opportunities, along with free online videos, were seen as important in training and development.

Focus group participants expressed interest in seeing some information like what had been accessible via the ShareILL wiki. They talked about how it should include information that was available before such as international interlibrary loan; information on licensing and copyright; conference opportunities; information on systems of interest; and more. However, we also identified both new areas to include as well as transformative functionality that could increase learning and sharing opportunities. Some new ideas gathered in our focus groups include:

- Resource sharing reports – not only report examples but how you do it, why you need to, who you can ask for help, and how to make that information accessible to others through data visualizations and more.
- Workflow documentation that others can consider and customize for their local needs.

- Ideas and links for important behavioral skills such as ways to handle conflict resolution with patrons, with each other.
- Best Practices with enough context that one can consider local applicability.
- Inspirational videos and readings.
- A Phone a Friend contact list.
- A web page with both links to vendor information as well as community space for sharing about the systems. One example is on level of interoperability which in turn could have links to more information on the concept.
- Ideas to save money.
- Assessment information from what, how, why, where, and when.

## **Conclusion**

The resource sharing community has a modest amount of useful but disparate resources. The IDS Project, Rethinking Resource Sharing Initiative, and OCLC Shares were some groups mentioned in our discussions as having useful information if you knew about them. New resources were created during the pandemic such as the OCLC Shares International ILL Toolkit. Ex Libris is supporting a new *Inter-Library Loan online community* which they envision as open to everyone (Moss, 2021). There is also some information limited to certain system users or consortia, although. Meanwhile reduced budgets, lower staffing levels, and lost years of staff expertise due to retirements provide challenges to being able to increase the community development sharing and learning. These challenges require the community to get better organized in how we collaborate. Focus group participant comments made reinforce the challenges while providing some paths to success.

They were very complimentary of conferences that were able to continue online. Larger audiences can be reached via online and hybrid conferences which has been shown to increase engagement between the presenter and the audience. Future conferences should strive to utilize the hybrid model as much as possible to expand access to information. The ability to network was lacking in early online conferences, but as time progressed conference sponsors introduced various types of virtual gatherings. These seemed effective and should continue to be developed.

Online courses and workshops are also vital to educate interlibrary loan practitioners. This could be beginner sessions on interlibrary loan basics which has been especially helpful to those new to the profession in the past as given by the IDS Project, and the ALA RUSA STARS Section. These sessions filled quickly with participants appreciating both a big picture view of the field, and basics of interlibrary loan. It was also a great place to network. Other online opportunities helped people stay up on the latest trends in the field and were easy to attend. We need to collectively seek ways to increase opportunities including more asynchronous learning. Online courses should also strive to support a variety of learning styles. Conferences and workshops can introduce practices to more easily support continued learning that expands collective knowledge. Some attendees should look for opportunities to develop their muscle memory through sharing what they learned in various ways.

An advanced website or “hub” of interlibrary loan information is a critical component that both facilitates access to information as well as promoting and enhancing both conference and online course learning. This new hub would build on the idea of the now defunct ShareILL with new topics and greater functionality. This next generation vendor and system neutral tool envisioned from our discussions should include important areas we had seen before although with enhanced content. This hub would host original content as well as link to content being

maintained elsewhere. An organization that provides an “ILL Borrowing 101” type session could either share their content as linked from the hub or even maintain the information in this new shared site.

Connecting information from conferences, workshops, and this new hub provides the most benefit for the least effort. Links to videos of the content being delivered extend access to those not able to participate in the online course. Others could utilize that information for their own discussions and contribute to a centralized discussion on the hub.

Copyright and Fair Use learning sessions continue to be very popular. This hub could host information such as a list of experts to consult as well as links to resources hosted elsewhere including papers, conference presentations, workshops, and videos. Both synchronous and asynchronous conversations on copyright and fair use enhance the knowledge of the greater community. A forum section on the hub that enables individuals to identify and engage with others elevates learning and community connection.

The hub would be community maintained. ALA RUSA STARS Committees, OCLC Shares, and Rethinking Resource Sharing Initiative are just three examples of groups who could contribute and maintain content. The benefit will be seen by members in these groups as well as the greater resource sharing community. Some other actions taking place in other spaces across the United States could be shifted to this new hub to help provide maximum information for the least amount of community effort.

The Resource Sharing Community has the collective mission, talent, and interest in improving services through collaboration. Even as technologies and consortia may channel us even more into disparate groups we can still work together collectively. Challenging budgets

make this an imperative. Let's use this defining moment to build on the successes we've experienced even as we take shared learning to a new level. A next generation, open to all, interactive online hub that helps connect in-person and virtual opportunities can both enable effective sharing on its own as well as synergistically improve knowledge gain with some conferences and other online opportunities. Focus group participants expressed interest in some opportunities continuing online. Imagine our traditionally strong in-person conferences going hybrid and cooperating with others to form more coordinated learning before, during, and after events. We can take our knowledge sharing to the highest level possible. It's in our blood.

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