

Library information sharing. Best practices and trends. Challenges and prospects

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Abstract

Libraries share information with each other, through interlibrary loan services, so that their library users can access more of the world of information than is available in any one library. When supported with enough budget, staff and authority to do so, library resource sharing specialists can facilitate information access in a variety of traditional and innovative ways, including and beyond lending and borrowing print and digital information. Best practices, trends and new solutions for library resource sharing are reviewed. International cooperation is also highlighted.

Keywords

interlibrary loan services, interlending, library resource sharing

*Share your knowledge.
It is a way to achieve immortality.*
Dalai Lama XIV

Sharing information is at the core of everything that librarians do to meet the fundamental human need for knowledge. Today, as always, most collect and preserve print and other physical formats to share with their local communities. They also license digital resources. They share the information available in everything from books to tools and from seeds to story times. They encourage learning and information sharing by offering programs for learners of all ages and by providing meeting and maker spaces. In addition, since no library can afford to collect or license all the information resources that people in their local communities might need, they request information from, other libraries, through services called interlending, document delivery or supply, interlibrary loan (ILL) or library resource sharing. And, in the spirit of reciprocity, they also make their collections available to other libraries and members of their local communities.

This sharing of information among libraries represents a long-standing and time-honored way to connect people and information. Although interlibrary loan was first codified in the twentieth century, libraries have always looked for ways to access information collected by other libraries; and, albeit with limitations, they have found ways to share. Not all of these examples are exemplary, such as when the Library of Alexandria kept original material from Athens and returned only copies [1]. Nonetheless, from medieval monasteries helping a select few, to modern public and academic libraries, ideally helping everyone to access information, arrangements to borrow books or share copies have been possible [2].

The modern era of ILL began when the American Library Association first adopted The U.S. Interlibrary Loan Code, in 1916. While not enforceable by law, and constantly evolving (it was most recently updated in 2016), this code offers a general framework and guidelines for sharing [3]. Similarly, the International Federation of Library Associations (IFLA) has guidelines for international ILL, as well as ILL in general. These were agreed upon in 1954, and most recently revised in 2009, representing the shared basis for reciprocal library information sharing [4].

Even in the Internet age, this work continues to be valuable; in fact, far from all information being available online, a great deal of information remains available only in libraries. A wealth of library information is to be found all around the world and, without exaggeration, can be said to represent the breadth of all recorded history. Even if new publishing models, such as open access, are successful, copyright and license restrictions continue to make many 20th century publications impossible to freely access online [5]. The costs of digitization and concerns about handling rare material will also continue to create impediments to free online access. In addition, even if open access is made available online, many information seekers may not have the financial and/or technological means to access it without the assistance of libraries [6].

Of course, ILL services, like all library work, also come at a cost [7] and, because the needs and budgets of libraries and their communities differ, the range of ILL services available inevitably do, as well. Depending upon the library, these services may be formal or informal, core or peripheral, manual or automated, efficient or slow, and regional, national, or international in scope. In some libraries, ILL may not be offered at all, or there may be strict limits on its use, because of the costs and challenges of staffing and sharing, as well as concerns about the legal right to share and possible loss of materials.

However, when supported with well-trained staff, consortium memberships, and appropriate technology, ILL can be of great benefit to individual library users. Such patrons, grateful for a satisfied information need, often become devoted library users and strong library supporters. To that end, this article will review some best practices and policies, along with some challenges and prospects, for interlibrary loan to be developed by practical solution to providing more access to more information for more people.

Like all library functions, ILL is continually evolving in order to maintain its relevance and value. Today, ILL departments can not only facilitate quicker and more efficient information sharing by rethinking technology, procedures, workflows, and policies, they can also provide related services. For instance, ILL specialists can help people access information that is locally available when local users are unable to find it themselves or when they need a scan of something on a library's shelf, in addition to information that is not at their local library. Some can even initiate purchases instead of borrowing information when this is the most efficient and cost-effective way to satisfy a patron's request [8]. In all cases, however, the goal of interlibrary loan services, like that of all library services, remains to connect library users with the information they need for personal and community growth, and that remains invaluable.

Best practices and trends

Friends share all things.

Pythagoras

Just as librarians share information with members of their local community in a variety of ways, there are a variety of ways to share information among libraries. There are also best practices and recommended policies. Of course, library budgets and the needs of their communities differ, so what is best for some is not best for all. Nonetheless, all library users benefit from a way to access locally unavailable information. So, all libraries should offer ILL to the best of their ability. It is a valuable service and there are ways for every library to encourage more lending and borrowing, in concert with other library services, in order to help librarians meet both the potential and the specific identifiable information needs of their users.

Joining networks or consortia that facilitate information sharing is one way to make interlibrary loan services more efficient and effective [9]. Such networks may agree to use shared software, to lend for no fee, and/or to help each other with training. It is also a best practice to go beyond any one network. ILL staff can contact their colleagues in other libraries through email or online requests through their websites; although this will take more time and may not always be possible, the effort can often pay off, with new contacts and fulfilled requests. This can be particularly necessary and effective when working with libraries in other countries. In some cases, physical loans may not be possible, but scans of a chapter or table of contents or index can help.

Properly installed, configured, and supported, shared software facilitates the steps involved in processing requests, making more transactions possible with less staff time. These steps include, from the borrowing side, requesting to receiving to contacting local users to returning items, and from the lending side, receiving requests, mailing or scanning or copying, and receiving returns. Shared software also can automate many of the steps of an ILL transaction, making them quicker and more cost effective, with less direct staff involvement [10]. Of course, technology itself can be costly to purchase or license and requires additional staff training and often complex customization. Consortia also can help facilitate interlibrary loan by agreeing to use shared circulation systems, which makes requesting even easier. However, whether libraries use

the same system or technology to facilitate transactions, they can set up reciprocal agreements to share freely with others and even help each other with training [11].

The largest shared system for library resource sharing is OCLC Resource Sharing, which enables over 10 000 libraries in 56 countries to share millions of loans and copies annually. Every 18 seconds, a member library fills a request. More than 7000 libraries used the system in 2016, sharing physical material and more than one million electronically delivered articles. There is also an annual OCLC Resource Sharing Conference which focuses on best practices and staff development opportunities. Sharing any one system that automates and simplifies discovery, processing and delivery enables savings of both time and money. OCLC's WorldCat represents holdings from libraries around the world (http://www.oclc.org/en/resource-sharing.html?cmpid=md_prod_resource-sharing). However, not all libraries participate in OCLC ILL because of costs and policy concerns. In addition, OCLC software is evolving to become cloud-based, which may limit the amount of flexibility and customizability libraries now rely upon. Since OCLC is a membership organization, representatives from libraries around the world can advocate for more reasonable fees which, in turn, would allow more libraries to participate in OCLC ILL, as well as openness so that the ILL community can contribute to improving its operation. In addition, those that cannot or do not join as full members, should still be able to interface with the OCLC system using third-party software.

Training and professional development are crucial in order to take advantage of efficiencies and participate fully and effectively in the ILL community. The more training staff members have in how to process requests, what software to use, what networks are available, and what policies and workflows support information sharing, the more potential there is in the practice. For libraries that want to do more, the first step is education about best practices. Most of the time ILL specialists learn on the job, hopefully from others in their departments, or if there is no one at their library, then from colleagues at other libraries who do ILL. Training and professional development are crucial in order to take advantage of efficiencies and participate fully and effectively in the ILL community.

ILL specialists understand that helping each other is how we help our communities access more information so there are many ways to learn more, just ask anyone. Such practices and policy recommendations are developed by professional organizations, such as IFLA ILDS or ALA RUSA STARS. They then disseminate them in codes and guidelines, present and discuss them at conferences, and write about them in journal articles and books.

There are several professional library associations that focus on and support ILL. The International Federation of Library Associations (IFLA) and their Interlending and Document Supply section (ILDS). According to their website, "The Section's primary objective is to extend and improve document delivery and interlending both nationally and internationally through the use of new technologies and increased cooperation among libraries and document suppliers... The Section monitors developments and provides

information to its membership through a section website, twice-yearly newsletter, programs at IFLA conferences, support of document delivery workshops, and cooperative projects with international organizations." They have a voucher scheme (<https://www.ifla.org/voucher-scheme>) whereby libraries in different countries can pay for ILL service by using coupons, rather than using different currencies. And, their guidelines include *International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure* (<https://www.ifla.org/publications/international-resource-sharing-and-document-delivery-principles-and-guidelines-for-proc?og=56>) and *Guidelines for Best Practice in Interlibrary Loan and Document Delivery* (<https://www.ifla.org/publications/guidelines-for-best-practice-in-interlibrary-loan-and-document-delivery?og=56>).

The American Library Association's RUSA STARS section recently updated their ILL Code for the United States. According to their website, "The Reference and User Services Association, acting for the American Library Association in its adoption of this code, recognizes that the sharing of material between libraries is a core library service and believes it to be in the public interest to encourage such an exchange. In the interest of providing quality service, libraries have an obligation to obtain material to meet the informational needs of users when local resources do not meet those needs. Interlibrary loan (ILL), a mechanism for obtaining material, is essential to the vitality of all libraries. The effectiveness of the national interlibrary loan system depends upon participation of libraries of all types and sizes. This code establishes principles that facilitate the requesting of material by a library and the provision of loans or copies in response to those requests." (<http://www.ala.org/rusa/guidelines/interlibrary>) There are also meetings at ALA conferences of STARS sections that discuss specific ILL issues and concerns.

Codes and guidelines are important for participating libraries as a shared basis for working together. Libraries can also go beyond these shared principles to more specifics about policies, workflows, services, procedures and technologies. *The Rethinking Resource Sharing Initiative* (<https://rethinkingresourcesharing.org>) is an ad hoc group that advocates for library resource sharing. Together with the ALA RUSA STARS Policy Committee, the STAR checklist (<https://rethinkingresourcesharing.org/star-checklist-2/>) of best practices enables libraries to look at their ILL services and consider what they can do to encourage more as suppliers and as requesters. The most recent version of this checklist was adopted in 2015. By discussing the 100 best practices within ILL departments and libraries, and comparing their own practices to the checklist, librarians are encouraged to consider or rethink how their policies, procedures and services can encourage more borrowing and lending of information. Libraries note what they are currently doing, along with what they plan to do, and can receive stars, demonstrating that they are aware of best practices and are implementing what they can. *The Rethinking Resource Sharing Initiative* also sponsors annual innovation awards that honors both institutions and individuals, showcases their achievements, and encourages libraries and librarians everywhere to continuously improve their services.

Two English language journals that offer a variety of articles relating to best practices and trends in library resource sharing are *The Journal of Interlibrary Loan, Document Delivery & Electronic Reserves (JILLDDER)* and *Interlending and Document Supply* which was previously published as *Interlending Review* and, since 2017, is published as *Information Discovery and Delivery*. Searches in any library literature index or internet search engine will return articles in these journals and others about everything from how libraries around the world do ILL to what they do and why.

Another important best practice is to garner institutional support for ILL services. ILL staff can demonstrate to administrators and faculty the need for ILL by reporting usage data, looking at reference questions, surveying their community, considering what other comparable libraries are offering and comparing what they do to the library literature, best practices, and guidelines described here [12]. How many ILL transactions are completed and how well ILL services are supported, like everything, often is a matter of will, demand and efficiency. ILL can be fast and efficient, using automation and reciprocal agreements, or it can be slow and expensive. It can be limited to nearby libraries or it can be international. Support may mean allocating more of a library's budget for training, technology, consortium memberships, and potential processing and copyright fees.

Beyond rethinking policies to encourage ILL, acquiring software to make it more efficient and training staff members to make it more effective, ILL departments today provide many services beyond traditional ILL. Such best practices or trends include purchasing new books or articles that are not available at other libraries yet. Even older items can sometimes be easier, quicker and less costly to buy sometimes. In such cases ILL staff may need to refer the request to an acquisitions unit, or they may be given access to a credit card or other means of payment. It can also sometimes help to contact an author directly and ask them if they can share their work. Another service that a library may offer is to scan material they have in their stacks and send it electronically so people do not have to come in and make copies themselves. Since ILL departments already do this for lending requests, they can also process these local requests efficiently and help serve their local users even more. These services are often called document delivery or scan and deliver.

ILL staff may also help people by searching the Internet to find a request, particularly if it is older and in the public domain already, or born digital and open access and is available online for free. This sort of reference work supports the library user in satisfying their request, and helps them access information more quickly than referring them to a reference librarian first. It is also important work for ILL departments to record and report, because even if there is no need to work with another library, they have spent time and helped a library user to access information. Other reference related work involves letting people know if requested material is owned by their local library when they have been unable to find it for any reason or helping them with referrals to visit another library or alternative sources if a particular resource is not available through ILL.

ILL departments can also collect and provide data that aid in collection development decisions. ILL lending requests can aid in digitization decisions. ILL consortia can evolve into coordinated collection development or shared circulation systems. An excellent example of an enhanced method of library information sharing is the new service from the National Library of Poland (<https://academica.edu.pl/>) which offers access to over 2 million digital documents from the National Library of Poland that are either public domain and freely available online or copyrighted material available at dedicated terminals at libraries working with Academica.

These examples broaden the scope of services beyond traditional library-to-library sharing. Nonetheless, since these are all ways to connect library users with requested information, they can be managed along with other ILL requests within ILL departments. Another important best practice, and hopefully a growing trend, is marketing library resource sharing services to information seekers. Many people do not realize all the ways that librarians can help them. They assume that they only have access to what they see in their library or can find online. Others may have heard of ILL but assume it is too slow to be of use. Letting people know about ILL is essential, because it is as much, if not more, of a window to the entire world of information as is the Internet. As the author, Neil Gaiman, has said, "I remember the joy as a small child, I would have been about nine or ten years old, of the interlibrary loan. I'd wanted to read a W. S. Gilbert play, and they didn't have the plays of W. S. Gilbert, and the librarian explained to me they could do an interlibrary loan, because there was a library in the system that had this book. And the amount of power was so exciting. And after that I started doing interlibrary loans all the time, because - it was like nothing could stop me." [13]

Challenges and Prospects

*There is no delight in owning
anything unshared.*

Seneca

Every filled ILL request represents a clear success in providing access to information by partnering with other libraries. Still, librarians who work to share information continue to face a variety of challenges. These include legal restrictions on information sharing because of copyright laws and license terms. There are also the challenges of meeting the costs of lending and borrowing, which can include processing and copyright fees, mail, technology, and providing enough staffing and staff training. It is difficult to estimate the cost of an ILL transaction because it depends on economies of scale, as well as what technology is used, how well staff are trained, how many staff there are, etc. Librarians must also support all other traditional services and collection activities, as well as new ones, such as digitization and open access efforts, at the same time as offering traditional and innovative ILL. All of these developments and possibilities enable more information sharing and deserve support, but finding the right balance for every library and community of users should serve as a challenge to do as much as possible rather than as an excuse to do less [14].

Beyond the challenges of sharing information with local partners or even libraries within any one country, all the challenges outlined here are exacerbated when doing international ILL [15]. Yet, everyday life for everyone in the 21st century is affected by shared global challenges and librarians benefit from the embrace of both a local and a global perspective. So, it is necessary to provide access to the world of information for local communities. As libraries around the world support the information needs of international students and international curricula, more of what their local community needs will be available only through ILL from libraries in different countries. Librarians are also aware that the information needed to solve the shared global challenges of a globalized world, must also be global and shared. So, because information from around the world is of value to people around the world, librarians work to share information globally. This they can do through becoming involved in the work of groups like IFLA ILDS or *the Rethinking Resource Sharing Initiative* or international committees in other national or regional professional library associations. They can also reach out to colleagues through email or at conferences in order to grow their own networks.

With respect to both national and international information sharing, librarians need to advocate for the legal right to share information. Copyright laws are meant to protect information producers or publishers. However, when they restrict library information sharing, they do not help individuals contribute to the creation and dissemination of knowledge for society, which is another essential reason that nations, and transnational entities such as the European Union, enact copyright laws. Librarians who care about information sharing must continually advocate for laws that support their right to share information that they have paid for, often by securing exceptions to copyright law. In the United States these are called fair use and in Canada they are referred to as fair dealing. In the European Union, exceptions are mandated by a set of ten copyright directives, which seek harmonization of copyright protections and limitations of those protections in national laws.

When librarians license digital information, they must also be sure that their licenses do not restrict their ability to share with other libraries. Librarians should continue to advocate for copyright laws that protect their right to share information and digitize their print collections. Until then, and until there is more open access publishing and more previously published information is available online for free, the future of library information and resource sharing will continue to include traditional ILL. There are also many who prefer print resources, so e-readers need to be improved. If, in the future, more information is available on open access platforms, then people with computer access will not need libraries to deliver it. Still, there are people without computer access and a need for libraries to help ensure that access to information is available for all.

Open access publishing efforts should also be encouraged by librarians, including ILL specialists who are particularly well aware of the frustrations that come from needing information that cannot be easily found [16]. By contacting authors and explaining to them that their work is unavailable from other libraries

or available only at a high cost from publishers, ILL specialists can contribute to this conversation and encourage more sharing by authors.

Although the full text of all information is unavailable online, more and more information is becoming discoverable online. So, information seekers will look for ways to access it. Expectations for easy ordering and quick delivery are also growing because of the experience of using online commerce. Social sharing sites, both legal and illegal, are also offering access to information more quickly and seamlessly than traditional ILL, although they come with their own limitations and dangers. Systems like OCLC Resource Sharing help librarians immensely. Still, other systems may be more appropriate for some libraries in terms of cost or openness and customizability, so it is essential that OCLC or any other large ILL system can be interoperable and support communication among all libraries, so all can participate in meaningful ways.

In the future, even should all challenges in information sharing be overcome, other challenges for librarians devoted to information access will remain. The traditional focus of ILL specialists on access remains, but librarians understand that the questions of information authority and evaluation are as important as any other questions of discovery or access that people face. Every ILL request comes at a point of need, and represents a teachable moment, permitting ILL specialists to help library patrons better understand what information is available where and why "just Google it" is not always the answer. Every librarian knows that information literacy is vital, so should librarians be asked to access what is in fact misinformation, they must also help people to identify and understand it.

Another challenge for ILL specialists is to market what they can now do, or what they could do if and when they are supported with enough resources, staff, training, technology, etc. Both information seekers and library administrators need to learn more about what is possible so that the demand for locally unavailable information is recognized and can be met. In the future, more libraries may see the value in supporting ILL more so that it can help access not only library material, but also provide more complementary services, such as local document delivery or collection development data or purchase on demand.

The rewards and satisfactions that come from helping information seekers access needed information are profound; the thanks librarians get from helping someone find something they need, and that they could not immediately access, never get old. It is also satisfying to work closely with others in libraries near and far to do so, meeting people at conferences or just emailing them in order to help individuals grow and societies succeed by sharing information. Librarians and libraries should continue to be known as places and professionals who can help connect people with information. As for library resource sharing, there is no doubt that any vision of a positive future involves librarians who help all people learn and contribute to our shared society; this depends on access to information which is what interlibrary loan services continue to provide [17]. In a world that is often divided, sharing information with all can unite us in recognizing our shared needs and humanity, as well as in developing and sharing solutions.

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Selected Interlibrary Loan Resources

Professional Librarian Associations:

- The American Library Association (ALA's) Reference and User Services Association (RUSA's) Sharing and Transforming Access to Resources Section (STARS)

Interlibrary Loan Code for the United States - <http://www.ala.org/rusa/guidelines/interlibrary>

- Forum for Interlending and Information Delivery - <http://www.forumforinterlending.org.uk/>

- The International Federation of Library Associations and Institutions (IFLA)'s. Section on Document Delivery and Resource Sharing IFLA ILDS

International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure Guidelines for Best Practice in Interlibrary Loan and Document Delivery

<https://blogs.ifla.org/docdel/>

- Rethinking Resource Sharing Initiative - <http://rethinkingresourcesharing.org/>

Professional Journals:

- "The Journal of Interlibrary Loan, Document Delivery & Electronic Reserves" (JILLDDER) - <http://www.tandfonline.com/toc/wild20/current>

- "Interlending and Document Supply" which was previously published as "Interlending Review" and since 2017 is published as "Information Discovery and Delivery".

Informacja o autorze

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