Introducing the RUSA STARS Rethinking Resource Sharing Checklist Version 2: How your library can become a STAR!

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Abstract

The American Library Association’s Reference and User Services Association division, STARS Rethinking Resource Sharing Policies Committee (Sharing and Transforming Access to Resources Section), has unveiled an updated version of the STAR checklist. Find out how your library can be a STAR and how the checklist can help to shape your library’s resource sharing policies. The ALA RUSA STARS Rethinking Resource Sharing STAR Checklist provides library staff an opportunity to review and reflect on the policies and processes that comprise the resource sharing service they provide.

This article describes how to implement STAR checklist standards to help serve patrons to their fullest potential. This article also expounds about the process of completing the checklist, the history of the STAR checklist, and how to strive to become a four STAR library! Earning STARS by completing the STAR Checklist can help libraries save money and impress administration.

Introduction

The goal of every library’s interlibrary loan department is give patrons seamless access to as much information as possible, with as few barriers as possible, as quickly as possible. What are the possibilities, and where do the barriers lie? Library employees are notoriously hard workers who and strive to exceed patron expectations. Have you ever wondered if your interlibrary loan department is doing all it can to expand resource sharing across the world? Do you have the ability to measure your library’s interlibrary loan processes? The Rethinking Resource Sharing (RRS) STAR Checklist might be the answer to all of these questions and more. The STAR Checklist is an assessment list of 100 interlibrary loan and resource sharing criteria that you can use to measure what your library is doing well, what you can improve upon, and what you aren’t doing at this time but hope to implement in the future. It may even give you resource sharing ideas you never would have otherwise considered. This article will: describe the history of the Rethinking Resource Sharing Initiative and the philosophy behind the Checklist, offer testimonials from library staff that have completed the checklist and changes from version one to version two; discuss which checklist discussion questions can be implemented at the departmental level and which have to be considered at the institutional level; provide instructions on how to complete the checklist; and show the benefits of completing the checklist.

Rethinking Resource Sharing Initiative History

The Rethinking Resource sharing initiative began with a white paper titled: “It’s Time Again to Think about Resource Sharing: A White Paper” published February 2005 By Ted Koppel, Candy Zemon, Brenda Bailey-Hainer, Mark Needleman & Gail Wanner. The authors were drawn together by their interest in interlibrary loan. Their purpose was not to improve upon interlibrary loan, but to completely start from scratch. The vision statement of this reads: “Create a new global service framework that allows individuals to obtain what they want based on factors such as cost, time, format, and delivery. This framework will encompass promoting and exposing library services in a variety of environments.” (Wanner, Beaubien & Jeske 2007).

The original group grew to include library staff from different library types as well as library vendors. They gathered in two forums: one met in Chicago in 2005 and another in Denver in 2006. As a result of their meetings, the groups identified possible solutions to current resource sharing challenges. The popularity of the forums lead to expansion of the resource sharing initiative, and in 2007, the expanded group created the Rethinking Resource Sharing Manifesto. From here, Rethinking Resource Sharing initiative broke into sub groups, one of which is the Rethinking Resource Sharing Policies committee, an official ALA committee under the Reference and User Services Association Sharing and Transforming Access to Resources Section. From the beginning, the groups have discussed whether or not to become a part of ALA and which division does resource sharing fit. For now, it works well under RUSA.

Philosophy of the Checklist

The ALA RUSA STARS Rethinking Resource Sharing STAR Checklist provides library staff an opportunity to review and reflect on the policies and processes that comprise the resource sharing service they provide.

The Checklist was created with interlibrary loan and resource sharing excellence in mind. The authors designed it to be a tool interlibrary loan and other library staff could use to get an idea of what was going well in their library regarding resource sharing, and what they could do better. According to Posner and Simpson in their article regarding the first version of the checklist: “The checklist includes more than 60 questions about resource sharing services and is designed as a tool to help library staff review and reflect on their resource sharing policies and processes.” (2011). The Checklist is intended to be challenging but achievable for most libraries to complete. Interlibrary loan staff can re-take the Checklist as often as they would like if it is believed the library can graduate to a higher STAR scoring than the initial score.

Checklist Version One

The first version of the checklist was launched in 2011. Thirty-four beta testers took part in completing the initial Checklist. Over the next four years, 94 libraries completed the checklist which at the time was a PDF document on the Rethinking Resource Sharing website, using pen and paper. Most of the 64 Checklist questions were directed towards academic libraries, and the wording of the questions inadvertently alienated school, public and special libraries. For example, one statement was “Our library loans bound journals.”. Not very many school libraries own bound journals, so this statement was very polarizing.

Testimonials for Checklist Version One

A public library in Illinois was one of the first to complete version one of the checklist. The interlibrary loan librarian stated “The checklist was very easy to complete, but it was a bit time consuming since I had to print it and score it by hand. It was great to see what my library was doing right and what we could improve upon. I noticed that quite a few of the checklist questions were not directed towards public libraries”.

The Getty library reported:
“At ILL staff meetings we went through item by item and had a discussion as to what we were doing, why we were doing it, and whether it made sense to change. Admittedly, we were already ahead of the game in most categories but we did end up changing some of our conditional messages in ILLiad for clarity. I let our assistant director and head of reference know where we stood and we had further discussions on why we couldn’t complete all of the items (broader policies due to our status as a special, independent, non-circulating library) but they were impressed with how high we did score-- not that they doubted our awesomeness before ; ).”.

The MNE library in St. Paul, Minnesota stated:

“Doing the checklist helped my director to understand that we weren't doing everything we could, and so she approved us changing a few things so that we could at least offer more to our patrons, if not more to other libraries. We did reconsider a few policies and are still in the process and switching over.

My director was the one who gave me approval to do the checklist, and she also helped fill it out, so it was definitely acknowledged by our administration.”

The National Library New Zealand responded:

“[As a result of completing the checklist] we joined OCLC WorldShare to increase our international presence. It was actually my manager who asked me to complete the checklist so it was definitely acknowledged by my library’s administration. The one area we are still working on is probably Q55 (I think it comes under this question) ILL staff is aware of the permissions for using licensed content We don't have statements on our electronic titles about how we can use our electronic resources e.g can we use the materials for interloan. The ILL staff have to get the information from other sources.”.

Checklist Version Number Two

Based on the feedback from the 94 libraries that completed version one, the creators of the Checklist implemented many improvements in version two. Through in-person and email discussions, 36 statements were added to make the Checklist an even 100 questions. The additional questions made the checklist applicable for all library types, changed the language so that it was more neutral in terms of different types of libraries, and encouraged international participation. The update to version two also brought the questions in line with the original Rethinking Resource Sharing seven item manifesto list. This manifesto was created in 2010, to “…[promote] a small, manageable set of principles to allow libraries to move towards removing barriers and developing user-centric services.” (2011).

Here are some examples of how the Checklist questions relate to the Rethinking Resource Sharing Initiative manifesto items:

Manifesto number one is: “Restrictions shall only be imposed as necessary with the goal that the lowest-possible-barriers-to-fulfillment is presented to the user.”

Checklist statement number 5 is related to manifesto one: “Library responds to or updates lending and borrowing transactions within an average of 24 hours”

By processing the request in a timely manner, you are helping to eliminate a time barrier to fulfillment.

Manifesto item number six is: “Libraries should offer service at a fair price rather than refuse but should strive to achieve services that are not more expensive than commercial services.”

Checklist question number 67 is: “Lending library charges reasonable fees that encourage, versus discourage, resource sharing.”

By reducing or eliminating a financial barrier to interlibrary loan, patrons will be much more likely to use interlibrary loan services.

Since the second version of the checklist is an even 100 questions, scoring the checklist has been simplified. The scoring template is as follows (from http://rethinkingresourcesharing.org/star-checklist-2/)

Scoring: The highest possible score is 200. There are four STAR levels:

1 STAR: Participating libraries that are score between 120 and 139 points are engaged in 60%+ of activities/initiatives/services/policies represented in the Checklist and qualify for one STAR.
2 STARS: 140-159 points reflect engagement in 70%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for two STARS.
3 STARS: 160-179 points reflect engagement in 80%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for three STARS.
4 STARS:  180+ points reflect engagement in 90%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for four STARS.

All STARS receive the Rethinking Resource Sharing STAR certificate and letter of recognition which affirms a library’s commitment to rethinking resource sharing. This certificate can be shared with your library administration to help demonstrate that you are keeping up with best practices in resource sharing.

Testimonials for Version Two

Some libraries that completed version two of the Checklist provided their input regarding improvements to the Checklist. Here are some of their responses.

From a public library in Illinois who completed both version one and version two:

“The second version was much more applicable to public libraries with the addition of the new questions. I liked that the second version was made available to complete online, the first version I printed out the pdf and that was more time consuming. The 100 point checklist was a little time consuming to complete but very easy and worth it to see what we are doing well and what we may be able to implement in the future.”

From the New Zealand national library:

“Doing the checklist helped my director to understand that we weren't doing everything we could, and so she approved us changing a few things so that we could at least offer more to our patrons, if not more to other libraries. We did reconsider a few policies and are still in the process and switching over.”

Checklist Questions at the Departmental Level and Institutional Level

The Checklist questions go beyond interlibrary loan staff to include the departmental and institutional levels. The questions that encompass staff outside of interlibrary loan demonstrate how resource sharing touches almost every library employee’s duties.

Examples of Checklist Questions geared towards interlibrary loan at the departmental level include:

Q22 Library processes user requests within an average of 24 hours

Q37 Borrowing library fills requests with local material when possible (i.e. places holds or

scan and deliver/document delivery.)

Q94 ILL staff mentor other ILL colleagues.

Examples of Checklist questions aimed towards the institutional level include:

Q42 Library considers lending reference books or bound periodicals (perhaps as short term

in library use loans.)

Q50 Lending library loans unique, locally created materials such as dissertations, town

reports, etc.

Q79 Library makes every effort to serve local borrowers who are short-term guests of the

Institution or community.

Unofficial Manifesto, Keep rethinking!

Another improvement for the Checklist version two was the addition of manifesto items. The manifesto is nearing ten years of existence, and some of these manifesto items have been adopted unofficially. The Rethinking Resource Sharing Policies Committee is re-visiting the manifesto for further review to determine if any part of it should be changed or updated. One of the items unofficially added to the manifesto is the topic of training, which discussion question 90 addresses:

Discussion Q90. Library provides a training manual with procedures and policies for staff.

How your library can become a STAR!

 Library staff can find the Checklist on the Rethinking Resource Sharing Initiative website [1]. If preferred, there is also the option to complete the checklist by downloading a PDF document and printing the Checklist. This PDF version of the Checklist can also be found on the Rethinking Resource Sharing website [2].

You may wish to consult multiple staff members while completing the Checklist in order to be sure your responses are accurate. Some of the Checklist questions are cross-departmental, so collaborating with colleagues in other areas of your library may be useful as well.

Benefits of completing the Checklist

There are many benefits to completing the Checklist. First, it is a good way to measure your library’s current interlibrary loan procedures and policies. There may be question items on the Checklist which you may not have previously considered that can be easily adopted. Second, a few questions on the Checklist may spur your library to make some interlibrary loan policy changes that could help lessen or eliminate interlibrary loan barriers for your patrons. Next, by completing the Checklist and hopefully earning one to four stars, you can demonstrate to your library’s administration that your library is a STAR resource sharer. One additional benefit is that as the Checklist becomes more recognizable amongst libraries, you can display your star or stars awarded on your library’s website to indicate to resource sharing partners that your library is very interest in resource sharing.

The Checklist can also serve as a method of library staff training in absence of interlibrary loan professional development. As Kochan & Leon stated: “Even when a consortium doesn’t have a formal mentoring program, ILL practitioners are not alone.” (2013). The STAR Checklist helps to fill this void, offering an easy way for library staff to stay in tune with other libraries and developments in ILL resources and best practices.

To foster discussion amongst your library staff, your networking groups, or consortium, you may wish to consider the following questions when considering completing the STAR Checklist. What would you add to a library information and resource sharing manifesto today? What are you doing in your ILL department that is innovative or exciting? What are you doing that really works well to meet user needs?

Conclusion

The Rethinking Resource Sharing Initiative’s version two STAR Checklist is an excellent way to measure your library’s interlibrary loan achievements and potential. By completing the version two 100 question Checklist, your library staff has confirmed their dedication to serving library patrons and identifies what they can do to improve upon their services. By earning the STAR certificate, your library staff can share this accomplishment with library administration and fellow colleagues.

1. <https://tufts.qualtrics.com/jfe/form/SV_cXPd0QGKjgCXHyB>
2. <http://rethinkingresourcesharing.org/wp-content/uploads/2012/10/Version_2_RUSA_STARS_Rethinking_Resource_Sharing_STAR_Checklist.pdf>

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