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# **FIL Newsletter**

**Forum for Interlending**

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# BLDSC Update

## Where are we now?

In October 2000, the final stages of the major change programme for our portfolio of services became operational. All customers should now have deposit or billing accounts and receive monthly statements reflecting use. Postal requests are now being keyed into our automated request processing system; this enables them to be matched electronically to our holdings database, routed immediately to the appropriate storage area and an online record kept to track their progress.

The most radical change for our customers has been the pricing of different services and service levels to reflect the actual cost of the process. Previously the photocopy service was subsidising the loan service, but we have now been able to reduce the cost of a photocopy for the UK to its cheapest level since 1993, allowing us to compete with other suppliers.

These changes haven't always been smooth, and customers are still phoning Customer Services to clarify some procedures. Main concerns have been:

- How to send/quote sources of reference
- Confirmation of the checking carried out on requests, given the new search levels
- Clarification of statements, invoices and charges

We have tried to respond to main concerns, mostly by telephone, but also by holding special clinics, putting messages on LIS ILL and by updating our FAQ page on the Web. To help in the clarification of account statements, we will shortly be looking at producing a summary statement which will summarise all credits and debits and, for deposit account customers, will include any cash deposits with opening and closing balances.

The other major issues still challenging customers concern the various and varied methods and pricing policies for third party interlending. While some customers are purchasing Interlibrary Request forms from us, which reflect our own charges, others are producing their own forms and/or charging a different price for the service. This is, of course, perfectly legitimate, but can be confusing to customers as well as being extremely time-consuming and resource intensive for us to handle in fulfilling our role as banker.

We are currently collaborating with CONARLS to put forward a proposal to the British Library Co-operation and Partnership Programme for a feasibility study to explore the options available for developing a new system for the financial transactions of third party interlibrary lending requests in the UK.

# News From The Regions



## Scotland

A Scottish Inter-Library Loan Rate (SILLR) of £4.50 per item lent or borrowed came into being on 1 October 2000, the same time as the CONARLS IRU Scheme was introduced. Over 140 Scottish libraries have 'signed up' to both schemes and others can join at any time, provided they complete the appropriate questionnaire which is available from Inter-Library Services (ILS). This questionnaire also covered issues relating to the emailing of requests and 'automatic' production of other requests. The responses to these questions have led to the re-introduction, after some 25 years, of a Scottish ILL Form (SILLF). The SILLF is not being provided in a conventional, printed format but as an electronic template which will produce 'a single sheet request' for applying to libraries throughout the whole of the UK and Ireland, BLDSC excepted, not just to Scottish libraries.

Currently, details of Scottish libraries participating in SILLR can be found on the URL <http://www.nls/ils/sillr> (new participants will also be advised via the lis-ill e-mail list) with information on SILLF at <http://www.nls.uk/ils/sillr/sillf.html>. However, these URLs may change as the National Library of Scotland (NLS) web site is being redesigned with the intention of becoming available in February 2001. On the new web site will, for the first time, be information about and on the services offered by ILS.

ILS will also be holding, on 7 March 2001, a day long seminar for Scottish libraries *so please keep the date free for it!* Details of this event will be put out on the e-mail lists, NLS website, by post, etc., as soon as possible but the impatient can contact ILS earlier if they wish! It is also hoped to officially launch ILS' electronic document delivery service, using Ariel, on 7 March.

## Information North

**"CARPE DIEM:  
Modelling futures for library regions in a changing  
cultural environment"  
York Conference Report - September 2000**

**If you missed the main event, you might be interested to go to:  
<http://thenortheast.com/conarls/carpeprog.html>**

**The site provides the conference Chair's introduction, speaker's  
PowerPoint presentations, a report of the conference and a list of  
delegates.**

## NWRLS

### Hands on UnityWeb!

Unity on the web will be an indispensable tool for all library and information services. It will support best value and lifelong learning through resource-sharing and networked access to a rich source of bibliographic and location information. Unity on the web represents regional and national co-operation in action for the benefit of all library users.

**Now you can try UnityWeb for yourself! Log on to our web site at  
[www.thecombinedregions.com](http://www.thecombinedregions.com) and click **UNITYWEB demonstration**.**

At the login page just click **GO**, it's that simple.

### Benefits of UnityWeb include:

- \*Access to an extensive bibliographic database with locations covering most of the UK and Ireland - a multi-national union catalogue
- \*Electronic messaging
- \*Public user access

## **Features of UnityWeb include:**

- \*Over 10 million records and over 35 million locations
- \*BNB, BLDSC Conference proceedings, monographs and serials
- \*BL Humanities and Social Sciences, BL Science, Technology and Business, The Stationery Office
- \*REVEAL: the National Database of Accessible Formats
- \*Unity Bibliographic records and holdings contributed by more than 450 libraries, all, one or any combination of the constituent databases can be searched
- \*Database updates available immediately

## **Searching**

- \*Quick search with a single box for your search term, Advanced search using Boolean operators, \*Cross-search: click a data element such as an author or subject heading in a retrieved record, to search for that term

## **Display**

- \*Clear, simple screens, designed to facilitate accessibility for visually impaired users
- \*Immediate indication of the number of holding regions and locations for each search
- \*Locations: you choose which regions are displayed and their order
- \*For public users all location information can be suppressed
- \*Location information including codes, contact details and in indication of lending terms (e.g. CONARLS rate)

## **Administration**

- \*Holdings information can be submitted through the web
- \*Maintain the information about your organisation with online real-time editing through the web
- \*Modify the enablements and preferences for each of your users, including user name and password

*Continued overleaf*

## The Combined Regions and Talis

The Combined Regions consists of five of the seven English Regional Library Systems (RLSs) The five national services: North Western Regional Library System, Information North, Yorkshire Libraries & Information, East Midlands, South West, The British Library, National Library of Scotland, An Chomhairle Leabharlanna (The Library Council of Ireland), Cydfenthycha Cymru/Interlending Wales and Share the Vision.

The purpose of The Combined Regions is to support inter-library lending, co-operation and access by merging the catalogues of its members into a single database, creating a unique and valuable information resource. The database is maintained and services are provided through a contractual partnership with Talis Information Limited, the leading supplier of library and information systems and services in the UK.

*A successful partnership achieving real results.*

For more information contact Deborah Ryan, Company Secretary, NWRLS which is host to The Unity Co-ordinating Office on 0161 234 1945 or e-mail on: [d.ryan@nwrls.org.uk](mailto:d.ryan@nwrls.org.uk)

## Learning On-Line: Empowering your Community

The North Western Regional Library System through its Open Learning Group held an innovative one day conference, the first of its kind in the UK - ***Learning On-Line: Empowering your Community***. The conference held at Bury College on 15th November 2000 brought together providers of education on-line, the University for Industry, **learndirect**, librarians, teachers and community education representatives from all over the UK.

The aim of the day was to explore how the University for Industry's learning service **learndirect** is progressing and operating both locally and nationally. **learndirect** aims to change the face of learning for many people enabling them to learn for fun or work to gain the knowledge and skills necessary to enhance their employability, their business competitiveness and to take control of their futures.

Nancy Cookson, Vice Principal of Bury College welcomed delegates. Her stimulating introduction to the day ***The Explosion of Learning*** aptly described opportunities on-line learning offers, by providing millions of people with the opportunity to be empowered with knowledge!

Michael Wills MP, Parliamentary Under-Secretary of State sent a letter of support to NWRLS. He wrote

*"the conference comes at a particularly useful time for libraries in this country. The Library & Information Commission report on 'Empowering the Learning Community' published in March this year contained radical recommendations for improving the way in which libraries meet learning needs, including better co-ordination between libraries and learndirect, which the Government is currently examining. He went on to say 'Your conference shows that in the North West you are already taking positive action to take these issues forward, and I wish you every success.'"*

Deborah Ryan, Company Secretary of NWRLS said

*"Librarians have always recognised the role that their services play in helping the public to access educational resources and at last this role is gaining wider recognition. This conference highlights the importance of libraries within the Government's vision of Ufi and lifelong learning.*

*I hope service providers will take this opportunity to extend their own learning by seeing how others have approached the challenges of implementing learning on-line"*

Speakers included Ken New, Head of the Network Co-ordination Ufi, who took delegates through *'the learndirect experience'* its history, development and goals. Tim Capelli: Manager at the Manchester Institute of Telematics & Employment Research (MITER) gave an overview of the SMILE project Skills for the Missing Industry's Leaders and Enterprises which aims to identify the skills required within the educational multimedia industry in creating materials for on-line learning. Tim also provided information about the British Association for Open Learning (BAOL) and the benefits of membership. A local perspective was provided by Jill Bartram, manager of N & E Manchester Hub. Jill shared her practical experience of developing and implementing **learndirect** in learning centres in a variety of venues in Rochdale, Oldham, Bury and Bolton. Jenny Jones as an active learner using **learndirect** at Ramsbottom Library, Bury gave an excellent personal perspective. Christine Almond: Learning Support Librarian, Bury Libraries and Nancy Cookson: Vice Principal, Bury College talked about developing partnerships between the public and academic sectors to provide easier access to learning opportunities using facilities in both colleges and libraries.

The Panel Debate was met with enthusiasm providing useful dialogue between providers, implementers and learners. Ken New, Head of the Network Co-ordination said he would take key messages from the day back to Ufi and that Ufi will be pleased to accept invitations to attend similar events throughout the UK.

Nancy Cookson ended the day by encouraging delegates to

*"take your dynamite, light the blue touch paper and help provide the explosion of knowledge!"*

## **WMRLS**

### **Redesigning interlending support**

Across the library and information landscape of the West Midlands, TLP-WM has inherited responsibility from WMRLS for a number of historical arrangements for interlending support. One of the proposed work areas (identified in the new organisation's 2000-3 planning document - *Action TLP*) is a review of regional interlending support. This paper sets out the context for such an exercise.

#### **1. V3.Online and enabling "a comprehensive and efficient service"**

In establishing TLP-WM it was agreed that for the time being public libraries would continue to use the V3.Online system. A regional package of supported on-line terminals (providing locations and electronic messaging), plus use of the database for the West Midlands union catalogue, is purchased regionally from LASER and recharged through the TLP-WM operational subscription element. The agreement is renewable annually and we are currently committed up until March 2002. Enhancing this primary provision is a residual bureau service exploiting the region's pre-ISBN/BNB manual catalogues, on-line access to the Talis database, Unity ISBN locations on CD-ROM, occasional recourse to OCLC First Search, use of BL's OPAC and other databases such as COPAC. The integrated V3.Online solution meets nearly all the public library authorities' needs for items not located in their own stocks. Roughly equal numbers of items are supplied from within the region, from the LASER region and from BLDSC (all via the system).

#### **2. The Transport Scheme and the Union Catalogue**

No specific interlending support package is provided to university libraries in the region who generally use BLDSC and other external sources. However, both public and university sectors use the Transport Scheme - for loans between libraries within the region, for inter-regional loans and for returns to BLDSC. The other shared element is the union catalogue itself which has been very well supported by many of the non-public library partners since the 1930s even though they do not stand to gain very much from their involvement. While the V3.Online database is an excellent source of supply for West Midlands public libraries, representation of TLP-WM partners' stocks is limited to BNB/ISBN material and to the majority (but not all) of the 22 organisations. There are major problems with updating which have not been addressed. Indeed the situation has got worse rather than better with not much more than half the region's mainstream stock on V3.Online.

#### **3. Charging**

Various charging mechanisms exist within these regional or national arrangements. These include BLDSC charges for supply of monograph loans and non-returnable photocopied journal articles, a common price agreement between TLP-WM and LASER for items lent within the V3.Online family, a system of credits applied to public library subscriptions, rewarding supply of single items and sets within the region, and payment for transport by purchase of regional and inter-regional vouchers. Recently in view of BLDSC's changed pricing structure, a CONARLS-led Inter Regional Unit (IRU) has been adopted by many UK library organisations including 19



out of 22 full partners in TLP-WM. Sets of vocal scores and plays are dealt with as multiples of the arrangements for single items at regional and national levels.

#### **4. The shifting landscape of resource sharing and document supply**

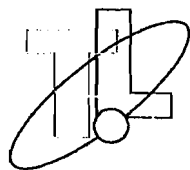
Although some elements of the current arrangements remain stable (and there is not yet any very strong indication of a decline in monograph interlending), there are many factors reshaping the way requests are satisfied in addition to changes at BLDSC.

There is the growth in electronic document delivery (especially in the university library sector). Expectations that items can be supplied are raised by wider/electronic access to bibliographic data for users. More titles are being published so it is less likely that libraries can supply from their own holdings. However, this potential expansion in demand is sometimes held down by charging or rationing. The recent reiteration by DCMS (as part of the proposed public library standards) that differential charges (between "internal" and "external" requests) must be both reasonable and modest may contribute to a freer access regime and may stimulate public library monograph interlending.

#### **5. The need for review**

Sections 1 to 4 have led us to the conclusion that a comprehensive review of interlending support in the region is necessary. It is proposed that:

- ❖ a small working group should be established made up of TLP-WM staff and 1 or 2 representatives from the User Group covering public and university libraries to steer the review
- ❖ this group would begin by devising a mapping exercise (using email) to establish how each partner organisation currently does its interlending; where possible data held by TLP-WM (V3.Online and CONARLS figures, levels of vouchers purchased etc) will be provided as a starting point and not asked for again!
- ❖ the survey would also cover expected changes in interlending and related resource sharing and document supply areas anticipated by TLP-WM partner organizations
- ❖ for this to be effective there will need to be a commitment from all 22 organisations to fill out the survey form and return promptly
- ❖ results would then be presented to a one-day seminar (in early 2001) with discussion of solutions to meet the needs of the region
- ❖ TLP-WM would then negotiate with outside providers of services on ways of implementing what partner organisations require



**The Libraries Partnership**  
West Midlands

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## News from LINC

The Library Association (LA) is to provide administrative and operational support for the Library and Information Co-operation Council (LINC) during the financial year 1 April 2001 to 31 March 2002.

This allows LINC time to consider whether the LIS domain still needs a cross-sectoral body to represent organisations involved in co-operation, sharing and collaboration.

The proposal from the LA, itself a member of LINC, was approved at LINC's AGM and Special Meeting held on 11 October 2000. The nature, structure and organisation of any revised LINC or successor body will also be considered.

The LA proposal replaced a recommendation from LINC Honorary Officers for LINC to be dissolved from 31 March 2001 on the grounds that it had successfully fulfilled its brief to promote LIS co-operation and partnership. In the new context of Resource, cross-domain partnerships with Museums and Archives, Regional Cultural Consortia and other major developments at regional level, it had been suggested that there was no longer a distinct role for LINC. Reduced financial resources were also limiting any opportunity for developing a broader role.

LINC Honorary Officers and members present at the meeting welcomed the LA's offer of a breathing space. LINC Chair Chris Koster comments: "It is important that the LIS community has a full debate on the need for a focus to represent the variety of sectoral interests within our particular domain, and on the form that focus might take."

Points made in discussion included:

- the possible continuing need for a forum to exchange information and experience and to be a sounding board for government and other agencies
- uncertainty about the impact of the newly established Resource on the LIS domain
- concern in LIS sectors, eg. health and education, at the new focus on synergy with Museums and Archives

It was agreed that the current Honorary Officers be co-opted to serve for the year 2001/2002. They are: Chris Koster, Chair; Frances Hendrix, Vice Chair; Paul Turner, Hon Secretary; Ray de Graff, Hon. Treasurer.

To contribute to the debate about the future of LINC, contact Paul Turner, LINC Hon. Secretary: [libsPT@hants.gov.uk](mailto:libsPT@hants.gov.uk)

The FIL Committee is represented at LINC meetings.

## A New CURL Monograph Interlending Pilot

The Consortium of University Research Libraries (CURL) encourages resource sharing and co-operation among its members – these being the major university research libraries in the UK and Ireland. CURL currently has 21 full members with 4 associate members (BL, the National Libraries of Scotland and Wales, and the Wellcome Library) and 1 co-operating member (the School of Advanced Study, part of London University). Criteria for membership and other information on CURL and its activities can be found on the CURL web site – <http://www.curl.ac.uk/>. A brief history of CURL can be found in (1).

Much of the co-operative and resource sharing activity has focused on the development of COPAC, but areas such as retroconversion and preservation have also seen significant development. A partnership with RLG (<http://www.rlg.ac.uk/toc.html>) has established a mutually beneficial alliance between 2 organisations working in similar fields of activity. All full and associate members of CURL are also members of RLG and can take part in programmes such as SHARES (<http://www.rlg.ac.uk/shares/index.html>), an international interlending group.

Perhaps CURL is best known for its web-accessible, merged union catalogues – COPAC. Long used as a finding tool, and not just by librarians, COPAC has recently seen its importance to the ILL community increased by the change to charging for location information introduced by BLDSC. Its value has been further enhanced by the provision of circulation information for some libraries' holdings. Once library collections are identified, and made widely available through a union catalogue, then providing access to these resources becomes a primary objective. The development of COPAC has always progressed with the aim of having a monograph interlending component. In 1997 a pilot project ran for 6 months to test the feasibility of monograph interlending among selected CURL members and one non-member. A summary of the pilot's findings can be found in (2), with a full description in (3) and (4).

Last November CURL launched the first phase of a new monograph interlending pilot, building on the lessons learned from the first project. A second phase is due to begin in February with the whole pilot scheduled to finish at the end of December 2001. This pilot is much larger in scope, and encompasses the participation of 15 university libraries - Birmingham, Edinburgh, Glasgow, Imperial College, John Rylands Manchester, King's College London, Leeds, Liverpool, Newcastle, Nottingham, Oxford, Sheffield, Southampton, Trinity College Dublin and University College London. Cambridge may join the project in January. Initially, participants will use RLG's RLIN technical processing interface to place their requests, but several libraries have expressed a wish to trial RLG's new standards-based product, ILL Manager. This should be ready for UK use early in the new year, following successful interoperability testing with BLDSC.

*Continued overleaf*

The pilot arose out of the objectives of the CURL Steering Group on Access, set up in 1998 to address issues of access to the rich research collections of CURL members (4). Its timing could not have been better. BLDSC commenced its new pricing policy in October 1999, charging £6-20 for supplying loans and £3-90 plus vat for location searches. In this context the use of COPAC can obviate the need to ask BLDSC to undertake searches, yet, where most libraries will still have to pay BLDSC to check or confirm COPAC information for passing to backup libraries, CURL pilot participants will have a direct requesting link to these libraries (Imperial, Trinity, Oxford). By using the standard SHARES charge of \$7 for each item supplied, participants will also see savings on loan charges. The issue for backup libraries is that they will receive less for supplying via RLIN than they would via BLDSC.

Prior to the November start date, 2 meetings were held at King's to assess interest, provide information and establish procedures. A special e-mailing list has also been used to distribute information and answer queries. Although monograph interlending is the focus of this pilot, libraries may also request copies. This is likely to amount to a very small portion of the total traffic since journal articles are often easily and cheaply available, either as full-text or from BLDSC, Lamda, BMA etc. Project participants were asked to become members of SHARES, if they were not already. RLG will provide statistical data and undertake invoicing and payment operations as part of its annual SHARES procedures. RLG will also co-ordinate training in use of RLIN and ILL Manager. Generally, SHARES policies will be followed, such as a 3-working days response time to requests. However, one change instituted since the pilot started has been to treat each request for a multi-volume item as a single request – SHARES policy is to allow up to 4 volumes on 1 request i.e. 4 volumes for \$7 rather than \$28. Discussions have also taken place on the best sequence of searching – either using COPAC first or to access the CURL union database via RLIN's Z39.50 gateway, since there are pros and cons to each. As much as possible of the various processes associated with interlending has been left to individual libraries to decide. The first pilot was quite prescriptive and suffered as a result. It is believed that, for the most part, libraries will first approach BLDSC using the 'S' search level and then, if not successful, go to pilot libraries.

From November, 5 institutions (Birmingham, John Rylands, King's, Leeds and Liverpool) have been making requests to each other within the framework of the pilot. Not all sites at King's and Leeds are currently involved but they will be, as will the other CURL libraries listed earlier, come February.

A high level of co-operation has enabled this pilot to get off the ground. Staff from CURL, COPAC, RLG and the member libraries have all been working together to investigate an alternative means of monograph supply. Additionally, as the British Library is an associate CURL member, BLDSC is formally in liaison with the pilot and has taken part in discussions. An interim review will be undertaken approximately 6 months into the pilot and a report produced.

## References

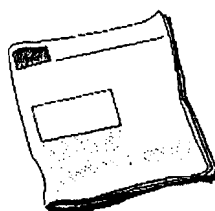
- 1) Fox, Peter (1999), 'CURL – Past, Present and Future', *New Review of Academic Librarianship*, vol.5, pp.115-124
- 2) *CURL Monographs Inter-lending Trial – Executive Summary of the Final Report*, via <http://www.curl.ac.uk/projects/monographs.html>
- 3) Mealia, Anne and Shoebridge, Michele, (2000), 'CURL Monograph Inter-lending Pilot', *SCONUL Newsletter*, no.19, pp.48-50
- 4) Thomson, Frances M. (1999), 'Access to Resources', *New Review of Academic Librarianship*, vol.5, pp.143-148

**Stephen Prowse**

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## Newspaper Library Catalogue goes online

The British Library Newspaper Library's catalogue of over 50,000 newspaper and periodical titles went online on 15<sup>th</sup> December 2000. A simple web system has been created which enables straightforward keyword searching. Readers all over the world can now search the Newspaper Library's holdings themselves by title, place of publication or date.



The catalogue includes all UK national newspapers from 1801 to the present, most Irish and UK provincial newspapers, some from the early 18<sup>th</sup> Century onwards, selected newspapers from around the world in western and Slavonic languages, including extensive holdings from Commonwealth countries, and a huge range of UK popular periodicals covering all subjects from fashion, pop music and cinema to sports, hobbies and trades.



## **EASY - Electronic Article Supply**

### **Project Overview**

EASY is a JISC funded two-year pilot project being run jointly by *ingenta* and *Lancaster University*. The main aim of the project is to test the feasibility of satisfying direct from publishers' digital files requests, which would otherwise have been sent from one library to another. The service is to be integrated with and to complement existing ILL services. The project will bring together Lancaster's widely implemented ILLOS inter-library loan management system and ingenta's electronic full-text document supply service. ingentaJournals now provides access to over one and a quarter million articles from over 2,700 titles.

The outcome of the project will be a system that will screen ILL requests for availability via the ingenta system. If an electronic version of the document is available from ingenta but the user does not have a subscription, then the request is checked to see if it is possible to purchase an electronic copy. If so, and the requester has the right privileges, an electronic copy may be purchased online at a standard charge of £4.20. Otherwise the request is referred for authorisation. Safeguards are built into the system to prevent unauthorised copying and redistribution of electronic copies of articles.

If the request cannot be satisfied by the ingenta system, it is passed to ILLOS for normal ILL processing.

The project is expected to demonstrate benefits to three principal stakeholders:

- Publishers will benefit by receiving income from the supply of articles in response to ILL requests, where they currently receive none.
- Librarians will benefit from streamlining of ILL provision at no greater cost.
- Users will benefit from rapid delivery of original-quality copies, which they may store electronically if they prefer.

### **Project Background**

The future of ILL in the electronic environment has been a difficult area of discussion between publishers and librarians. Publishers are concerned about the risk of illegal copying and redistribution of electronic text, and librarians are concerned about the possible loss of the 'public good' element in copyright legislation which ILL represents. The Publishers Association (PA) and the Joint Information Systems Committee (JISC) of the Higher Education Funding Councils set up a working party to consider these matters.

The solution that the PA/JISC working party recommended was a service in which publishers were involved (protecting the commercial interest) and yet which was still cost-effective for libraries (protecting the public-good interest). The service would be self-funding. It would provide income to the publishers, but the cost to the libraries would be no greater than current interlibrary loan fees.

There are a number of key elements in the model which are essential to its success:

- Low administration costs through the use of electronic requesting and supply
- The use of standard procedures to ensure simplicity of operation

In addition, the operation of the system will be considerably simplified during the pilot period by the acceptance by publishers and librarians of a standard fee. One of the points to be studied during the evaluation is the necessity or otherwise of maintaining this subsequently.

The way in which the working party considered that these elements could be best secured was through a clearing-house service.

The clearing-house will:

- Receive requests from libraries in a standard electronic format
- Ascertain whether an electronic version of the text was available
- Transmit the request to the publisher's server
- Arrange for the electronic text to be sent to the end-user (if necessary, via the library's server)
- Invoice the library for the agreed cost of the journal article supplied and pay a percentage of this to the publisher

The advantages to publishers in this model are:

- the supply of the electronic text is from their own server, or from a server authorised by the publisher and therefore under their control
- they receive some income from ILL supply of articles

The advantages to librarians are:

- they can secure electronic copies of single items for their users at no greater cost than what they currently pay for ILLs
- some saving of overhead costs.

Co-operation between librarians and publishers in establishing the service will also bring benefits to both communities in overcoming friction and encouraging better relations. Interlibrary loan has been such a difficult area that success in establishing a new model for journal article supply will be a major achievement.

*Continued overleaf*

### **The EASY service**

The pilot service is designed as a relatively small scale 'proof of concept' project to test the feasibility of the new electronic ILL model. Initially the project will be based on the ILLOS Inter-Library Loans management system and the ingenta database of electronic journal articles.

The main features of the service are:

- End-user initiates an ILL request via the ILLOS web interface which checks with ingenta on the availability of the article in the ingenta database.
- If the article is available from ingenta and the ILL administrator has decided to offer the EASY service, the article (PDF) will be sent to the end-user as an email attachment.
- If ingenta cannot supply the article electronically, the request will be processed as a normal ILL request.
- Acceptance of the EASY terms and conditions of the supply and use of article supplied via EASY will be executed electronically. It will not be necessary for end-users to sign copyright declaration forms.
- The standard charge for all documents supplied by EASY will be £4.20

### **Non-ILLOS sites**

Although the pilot project is based on ILLOS customers, a service for non-ILLOS sites will be provided. This will be based on an Application Server at Lancaster University. The terms and conditions of use of the Application Server have not been finalised yet. Details were announced in January 2001.

### **Timetable**

The service started in January 2001, and will run to 30 June 2002.

### **Registration**

All libraries wishing to use EASY must register by signing an agreement concerning the conditions of use of documents supplied under the terms of the EASY Project. Registration forms are available from Lancaster University Library.

For further details contact:

Ian Stuart  
Lancaster University Library  
Lancaster LA1 4YH

Tel: 01524 592540  
Email: I.Stuart@lancaster.ac.uk





# The international scene

## **Impressions from a visit to Germany**

In October 1999, the University of Bristol Library welcomed the Librarian of the Hochschule Anhalt. Herr Schlenter was visiting the Library on an exchange visit arranged through the British Council in Leipzig. I was able to talk to him about Inter Library Loans (ILL) during his stay and this made me realise that, although the German system for ILL is very different to that of the UK, it would be interesting to find out more. When Herr Schlenter returned to Germany, he invited a member of Bristol's library staff to visit the Hochschulebibliothek, so I expressed an interest in going. It was agreed that I should go and my visit was arranged for the last two weeks of March 2000.

The German system for ILL is focussed around Regional Systems, which are based on the German regions or Lande. The Regional Systems co-ordinate ILL and document delivery and there is no central source, such as the UK has in the British Library Document Supply Centre (BLDSC). At the time of my visit BLDSC was in the process of introducing changes to its procedures and the role of the UK Regional Library Systems was under discussion because of changes to their organisational framework. This made my opportunity to see the different organisation of ILL in Germany very timely.

I was based during my stay at the Hochschulebibliothek Anhalt in Koethen, about seventy kilometres from Leipzig. The Hochschule has three sites, in Koethen, Bernberg and Dessau. ILL and other operations such as Cataloguing and Acquisitions are centralised at Koethen. Germany has seen a lot of changes since the fall of the Berlin Wall in 1989 and I found it fascinating to see and hear about the effects of these for libraries at first hand. For the past ten years the German government has been making additional funding available to libraries in the former East Germany to buy books and serials. There has also been funding available for new buildings and for refurbishing existing libraries. However, there has not been any extra funding for staff and this has created problems. I visited mainly academic libraries, as visits to the Universities of Magdeburg and Halle were arranged for me. At Magdeburg I was told that before 1989 there had been two thousand engineering students and only two hundred students of economics. Now the figures are reversed. This is one reason why libraries have been given additional money for acquisitions, as they need to build collections in different subject areas. Like librarians in the UK, German librarians are also struggling to keep abreast of developments in technology, so there was plenty to discuss besides ILL.

*Continued overleaf*

I was able to spend time with ILL staff at the Hochschulebibliothek and at Magdeburg and Halle. The Libraries at Magdeburg and Halle are also "Landesbibliothek" as well as university libraries, which means that they are open to members of the public as well as the staff and students of the Universities. Another difference was the amount of automation which was used for ILL. At the Hochschulebibliothek all ILL records were still kept manually, but the other two libraries used an on-line system provided by PICA. The staff at the Hochschule hope that they will be able to use the same on-line system soon. The local Regional System, the Gemeinsamen Bibliotheks Verbund, GBV, also uses PICA for its computer system. I did not find a range of different automated systems being used by libraries in the part of Germany, which I visited and this is a contrast to our situation in the UK.

GBV was created in 1996 with the aim to create a framework for appropriate library systems and to develop digital library services. GBV provides access to commercial databases for libraries, but I will not include this here. GBV has a web site at <http://www.gbv.de/> and this includes pages in English, which give more information about all their services. There are about two hundred and eighty libraries sharing in the GBV network and they contribute to the primary databases for ILL. These are the "Union Catalogue of GBV" and the "Search and Order" database. These databases record the holdings of the member libraries and all the periodical holdings of libraries throughout Germany which are part of the SUBITO system. This is a nationwide service for providing copies of articles from periodicals.

The three libraries I visited all used GBV for placing ILL requests. At the Hochschulebibliothek this was done by library staff from forms for requests handed in by their readers. Staff searched the database to find matches for requests and then sent the request electronically to the holding libraries. It is possible to see from the information on the database whether a copy is in a collection available for ILL or not. German libraries have a distinction between books, which are for loan and reference collections which cannot be borrowed. At the Hochschule and the other libraries I visited the reference collection was larger than the loan collection and this came as a surprise to me, as I am used to a very different situation in British libraries.

Readers at Magdeburg and Halle, including the members of the public who use those libraries, have on-line access to the GBV databases. This allows them to search for items in which they are interested and then place requests on-line for them. These requests are sent electronically to the holding libraries directly, without intervention from their home library staff. Both loans and copies of articles can be requested. Copies of articles are sent directly to the reader, by post, fax or electronically (ftp by e-mail), depending on the choice made by the reader and they are charged according to the delivery method and the length of the article. Loans are sent to the reader's home library. The reader's library identification includes this information. All the libraries, which I visited, charge three Deutschmark for a loan (about one pound sterling). At Magdeburg and Halle, because readers are allowed to place requests directly, they have to have an account with sufficient funds to pay for the requests which they make, so that they can place requests. Library staff need to "top up" these accounts for readers to allow them to continue to use the system and readers had to come to the library to do this. The Hochschulebibliothek is hoping to introduce this

service for their readers and all the library staff are very enthusiastic about it. I was glad to see it and to hear from staff about it. As both UNITY and V3 continue to develop public access, I was interested to see how this might work in practice and certainly came away feeling very enthusiastic myself.

This is only a brief summary of my experience in Germany and I would be glad to answer any questions (e-mail address is [j.i.bradford@bristol.ac.uk](mailto:j.i.bradford@bristol.ac.uk)), so please contact me if you would like to know more. I am very glad that I had this opportunity. It made me aware of some of the advantages and disadvantages of both the British and German models of ILL and helped me to think critically about them. I was able to look at all library operations, not just ILL, and this was stimulating too. I stood back from my own situation and was able to think more widely about a range of issues affecting libraries and this was very valuable. I also have more confidence about international ILL. On a personal level, I felt very welcome and that I'd made friends who would continue to be friends once I returned to the UK. I would like to thank all the staff, whom I met at the different libraries I visited for their help, and British Council in Leipzig for their support. The Library Association paid my fare to Germany and I would like to thank them too.

Jean Bradford  
Serials and Inter Library Document Delivery  
University of Bristol Library



## **Report on IFLA conference Jerusalem – 13-18th Aug 2000**

A very interesting and varied programme of papers and workshops accompanied by an exhibition and poster sessions. The exhibition took place over three days of the conference with more than 75 exhibitors on hand to display their latest products and services. Over 1500 delegates in total attended the conference. Although it is only possible to meet and exchange thoughts and ideas with handful of those present, it provided a stimulating opportunity to meet librarians from a variety of cultural backgrounds (as well as a useful forum for promoting FIL).

Because there was so much going on I've selected, in this report, to concentrate on the matters directly related to my attendance at the conference. Namely the work of the committee I was elected to serve on, ideas and plans we are working on for future conferences and a specific project I, as a member of a sub-committee of the Section, am actively involved with.

*Continued overleaf*

## **Contents**

- ◆ Standing committee meetings
- ◆ IFLA Principles and Guidelines
- ◆ Document Delivery and Interlending workshop
- ◆ Conference programme
- ◆ Action plans:
  - Boston 2001
  - Glasgow 2002

## **Standing committee meetings**

Each Section holds two committee meetings during the conference period: one before the official start of the committee and one the day after its closure. Given the wide geographical dispersal of committee membership, the conference is the only opportunity for committee members to actually meet up, hold formal sessions and make future plans. By necessity, a large amount of communication and work on special projects is done via email. I have included the full agenda minutes of the two Section meetings held which I attended and have highlighted particular matters of relevance.

I have included the full agenda minutes of the two Section meetings I attended and have highlighted particular matters that are either interesting or relevant ILL developments.

## **Meeting 1 – Sat 12<sup>th</sup> Aug 8:30**

- Approval of agenda
- Approval of minutes of SC meeting in Bangkok, 1999
- Chairman's report – Agneta Lindh
- Financial report – Mary Jackson
- Communications – Carol Smale
- Matters concerning the Jerusalem Conference
  - Programme – David Kohl
  - Discussion Group, Repository Libraries – Pentti Vattulainen
  - Discussion Group, Reference Work – Annsofie Oscarsson
- Report from the IFLA Office for International Interlending – Sara Gould
- Report on revision of Principles and Guidelines – Sara Gould, Poul Erlandsen, Penelope Street, Celine Menil, Beth Hanson
- Review action plan for 2000-2001
- Plan for Boston 2001 Conference

A number of action items were planned during Bangkok. Among them were ideas for creating a web template for email requests and mounting an online copy of the paper IFLA request form that could be printed from the web in lieu of photocopying a paper form, which many libraries are doing.

The standing committee also spent considerable time at the Bangkok Conference revising the Section's action plan for 2000-2001 and rewriting the Section's scope and goals statements. At the end of the Boston Conference we will be required to submit new (or reaffirm the existing) scope and goals statements to serve as guideposts for 2002-2004. This review was begun at the two meetings held in Jerusalem.

After much discussion, the IFLA list of recommended response codes is now available at <http://www.ifla.org/VI/2/p3/rcodes.htm>. The aim of the list is to improve international interlending loan, by removing the need for ILL responses in different languages. When an ILL request cannot be satisfied immediately by the supplying library, a reply is required to inform the requesting library of the reason for non-supply. The use of natural language may prevent the response being understood by speakers of other languages and may hinder effective ILL transactions. This list of coded responses allows supplying libraries to provide a reply for unsatisfied requests that can be understood worldwide.

### **Meeting 2 – Fri 18<sup>th</sup> Aug 10:30**

- Reports on section's Jerusalem Conference activities
  - Programme – David Kohl
  - Workshop – Sara Gould
  - Discussion Group, Repository Libraries – Pentti Vattulainen
  - Discussion Group, Reference Work – Annsofie Oscarsson
- Complete planning for Boston 2001 Conference
- Complete review of action plan for 2000-2001
- Advance planning for Glasgow 2002 Conference
- Other business

### **IFLA Principles and Guidelines**

The Section on Document Delivery and Interlending, together with the IFLA Office for International Interlending, has undertaken a major revision of the Principles and Guidelines for Procedure, originally drafted in 1978. The revision of the Principles were presented to the Standing Committee for comment at the first committee meeting and then discussed and revised at two meetings of the sub committee (Sara Gould, Pennie Street, Celine Menil, Poul Erlandsen, Beth Hanson) held during the Conference. The Principles and Guidelines developed by IFLA have no mandatory force, but aim to protect the interests of all libraries and set out the obligations of individual nations for document provision in an international context. This is the first revision of the Principles in 14 years. Members of the Section will be invited to comment on the draft Principles and Guidelines via bulletin board after which a further meeting of the sub-committee is planned at the end of the year to consider/integrate comments received.

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### **Document Delivery and Interlending workshop**

The Section organised one programme at the Jerusalem Conference, on the effect of licensing on traditional inter library loan. The underlying question is whether libraries that subscribe to electronic versions of journals will still be able to make article copies for other libraries requesting these articles through the normal loan process. Will the contractual relationship spell the death of copying that is now permitted under most copyright law?

Theme: *Licensing information – an end to sharing?*

Programme:

- Integrating electronic journals into document delivery: a practitioner's view  
Jacob Harnesk (Customer Service Department, Karolinska Institute Library, Stockholm, Sweden)
- Will copyright survive? Is licensing a Trojan horse?  
James Neal (Johns Hopkins University Library, Baltimore, Maryland, USA)
- Cheaper by the dozen: consortial journal licensing  
Claudine Dervou (Physics and Informatics Department, Aristotle University, Thessaloniki, Greece)

### **Conference programme**

The Acquisition and Collection Development Section presented two interesting programmes that I also attended. The access to full text articles provided by electronic journals combined with the rapidly increasing number of such journals being offered by universities has an effect on traditional ILL supply. Questions of copyright and licensing surround the use and supply of full text articles obtained from this source and the viability of their use for ILL requests.

- *Collection development in the digital age: organisational challenges*  
Interesting for the useful background it provided on the BL's strategy for electronic material was a paper by Jim Vickery entitled "Reorganisation in the British Library to acquire electronic resources."
- *Models for acquiring electronic resources*  
A particularly interesting and relevant paper, given some of the initiatives I have been involved with at Liverpool was a paper from Diann Rusch-Feja (Max Planck Institute for Human Development, Berlin) entitled "Some consortia models for acquiring electronic resources in Germany."

The Marketing of Library Services to Academic Communities Discussion Group took as its theme *Raising the profile of academic libraries and librarians*. The discussion centred around three marketing issues: marketing academic services beyond the university campus as part of a campus-wide strategy; strategies for raising the profile of academic libraries; developing a market place – where to get started. The Management and Marketing joint with Information Technology and Social Sciences Libraries took as their theme: *Building change management and marketing skills for the information age*. The programme comprised five papers of which three were of

particular interest for the insight they offered into managing the hybrid library and electronic resources.

- "Information ecologies: the library's changing role in an information society."
- "Migrating from the library of today to the library of tomorrow: re- or e-revolution?"
- "The management of change in electronic libraries."

The Group's second programme considered, as its theme, *Changing patterns of Library work for today and tomorrow*. Of interest were two papers:

- Library management with new technologies
- Internet librarianship: traditional roles in a new environment

### **Action plans for future Conferences**

#### **Boston 2001**

##### **Workshop: ISO ILL protocol demonstration**

The purpose of this workshop is to provide system suppliers with an opportunity to demonstrate their new, ISO compliant, ILL systems. The intention is to invite a number of suppliers (British Library, Innovative Interfaces, Fretwell Dowling, RLG) to demonstrate and to give delegates the chance to examine each system and ask questions relating to performance etc. To enable delegates to get a comprehensive overview of all the systems it is planned to draw up a checklist of questions that delegates can use as a guide/comment sheet. Because of space restrictions and potential popularity, it is anticipated that the workshop will be restricted to a set number of delegates.

##### **Programme: Involving the end user – patron direct ILL**

The idea is to develop this into a programme which would start with an overview of patron direct ILL – pros and cons etc. There would then be three-four case studies in which participants would outline the work of various projects which involved end-user participation. Possible areas suggested included Denmark, Germany and, to get a broader representation – an initiative being undertaken in either India/Far East or Latin/South America.

#### **Glasgow 2002**

The second Standing Committee meeting discussed tentative ideas and themes for a workshop and programme for Glasgow. The general concept of access to information and the cost factor attached to it was mooted. It was felt that the question of the acquisition of information in its many forms and the variety of methods available for achieving this were areas worth exploring.

Penelope Street

# **INTERLENDING & DOCUMENT SUPPLY SEVENTH INTERNATIONAL CONFERENCE**

**1-5 October 2001  
TR3 Conference Centre  
*Ljubljana, Slovenia***

Organised jointly by the National and University Library, Ljubljana  
and the IFLA Office for International Lending

**Theme:** *Providing access through co-operation*

Co-operation with other players has always been crucial to effective interlibrary loan and document supply. Traditional partners in resource sharing have always been other libraries, and more recently, commercial document suppliers. Increasingly, however, the boundaries between traditional interlibrary loan and commercial electronic access are becoming less defined, and the work of the ILL department brings it into contact with a range of other players: publishers, of course, but also rights organisations, library consortia, and developers of technical systems and services. In other areas, the services offered by the ILL department may overlap with those offered by archives, book distributors or repository libraries. As well as providing an update on emerging ILL trends and challenges and taking a look at current practice, this conference aims to look beyond traditional document suppliers to include services offered by other resource providers.

For registration details please contact Pauline Connolly

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Boston Spa  
Wetherby  
West Yorkshire  
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## **Workshop March 28<sup>th</sup> 2001**

**University of Bristol 10 a.m. – 3.30 p.m.**

Part 1) Documents Direct - Katie Birch, Project Manager  
(Unmediated document delivery)

Part 2) Review of recent changes at BLDSC with staff from  
Customer Services at BLDSC

**Cost £30 for FIL Members (£35 for non-FIL members)**

**For those of you who haven't yet booked, here is another opportunity.**

Please contact:

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**Closing date for applications 28<sup>th</sup> February 2001**

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