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Hello from the Editor

Hello from the Editor: Dawn Downes, University of Winchester Senior Library Assistants, Customer Service



This has been an interesting issue to get out to you as I'm not only the new editor of the journal, but also a new member for the FIL committee. Because of this we have not been able to get this out to you as soon as we had hoped. In the future this will be less of a problem, fingers crossed! I have to admit right here this has been a steep learning curve and as I'm not a natural at grammar, I'm crippled by my Americanisms, I've asked for help. With the permission of the committee I started a working group for the journal. So a big thank you to Saskia van Elburg and Matthias Werner for their help. If you are interested, we could always use some more help with the grammar! Also, a big thanks to Chris Beevers for his advice and input.

I thought I should introduce myself to you all here instead of later in the issue with the other new members. I'm an American who moved here after marrying my Shropshire Lad in 2002. I always knew I wanted to work in Libraries. We were never able to visit our local Public Libraries regularly, as we always lived in the country or a town that didn't have one. When I did visit, I never felt comfortable on the "wrong" side of the desk. Even now if I visit a Library I want to get to work, tidying the shelves or helping patrons/borrower/users (whatever you call them). I volunteered at our tiny school library in High School, and at both of the Universities I attended I worked as many hours as I could. At the second University I attended, I begged for a job and they put me to work typing envelopes for microfilm (remember what those are anyone?).

I was given my first full time position when I moved to Indiana and the Librarian at a large Public Library took a chance on me. I was given a lot of responsibilities quickly, but the fit was right and I enjoyed every minute. After moving to the UK, I had a Public Library job for under a year and then moved to my current position at the University of Winchester. I enjoy the academic world, but do miss working with the general public, especially the little ones. I took over the running of the ILL team a few years later and have enjoyed the challenge! I'm also managing our Library Assistant team, journals and currently refurbishment as well. I'm very busy as I'm sure you all understand well!

Dawn

Message from the Chair: Sandra DeRoy, University of Essex Principal Library Assistant (Interlibrary Loans)



Dear Everyone

It was lovely and warm in Manchester in June at our annual conference, although that now seems like a long time ago. We said goodbye to some committee members and I would like to extend my personal thanks to each of the outgoing crew for their time and dedication to FIL over the years. I'm sure you will all join with me in wishing Julie Clement, Tracey Jackson, Su Fagg and Gill Wilson (our CONARLS observer) all the very best in their future endeavours.

However, I was delighted that we were able to fill the four vacant slots on the FIL Committee and I can formally welcome Dawn Downes (who you have already met in the editor's letter), Matthias Werner, Nigel Buckley and Graham Dix to the team. They will each introduce themselves in a personal biography later in the edition.

We will soon be undertaking the task of organising next year's conference, due to take place in June in Portsmouth, so I thought I would take this opportunity to ask everyone to have a think about what they might like to see or hear about for next year. We are always happy to receive suggestions and would welcome any input from the readership. We would particularly like to hear from those who work in the public or health libraries as we want to ensure that we cater for all who work in the field of Interlending.

Also, if anyone fancies seeing themselves in print and has something that they would like to share with us they can always contact Dawn (Dawn.Downes@winchester.ac.uk) as she will be overseeing the production of the FIL Journal for the next year. We also have the blog running this year, and we would welcome any items of interest if you didn't want to write formally for the Journal. We are flexible that way.

I look forward to hearing from any interested parties!

Sandra

Introducing Your New Committee Members:

Graham Dix, Birmingham City University

Principal Library Assistant



My first degree is in Russian. As an undergraduate I studied at the Centre for Russian and East European Studies at the University of Birmingham. I decided that I wanted the Librarian's job, if she ever left. To this end I took a Masters in Library and Information Studies at Loughborough University. The Baykov Librarian post did become vacant in 1986 but I didn't get it that time, I had to wait till it became vacant

again in 1992. In the meantime, I worked as an Audio-Visual Librarian at Norwich City College. I had a great time running the Russian Library until 2003 when I had to leave due to ill-health. Once recovered, I worked for a few years in public libraries in Birmingham before joining the ranks of Document Suppliers in 2008.

I am now the Principal Library Assistant for Customer Services Supply Division of Library and Learning Resources at Birmingham City University. I have the overall responsibility for ILL requests and reservations across all five campus libraries, as well as stock withdrawal. Since I was appointed in 2008 my team of about six full time equivalent library assistants have introduced Secure Electronic Delivery of journal articles and, two years ago now, an online requesting service. These new services, and the fact that we don't charge anything for placing a book or journal request, led to an increase in loan requests to 6000 last year (from 4000 two years previously). There are signs this year of the number coming down again as researchers increasingly find what they need via e-books and e-borrowing.

Outside of libraries I read, write fiction and run the occasional half marathon, but only when my eleven-year-old daughter isn't keeping me busy."

Matthias Werner, University of Kent Library Assistant Document Delivery / E-Resources



I do not actually have a library background, other than spending most of my university life in the library. After graduation I moved from my home town in Germany to London where I worked as a proof reader for a translation company. When our first child was born in 2007, I took some time off and then worked as a temp in various administration roles at the University of Kent.

My first library job at Kent was in the cartoon archive where I scanned newspaper cartoons and other art work for the British Cartoon Archive website (it is actually a great website – check it out). I soon after found a permanent position as library assistant at the Templeman Library in 2011. When a senior colleague retired I took over the day-to-day running of the document delivery service. It has been a steep learning curve but I enjoy the job very much. I am based in the e-resources and serials team which means that I am also involved in all things related to journals, databases and CLA scanning.

With three young children (all girls, two of them twins) there is no such thing as spare time. I started to learn playing piano a few years ago, and from time to time I am allowed to go to the pub or cinema.

Nigel Buckley, Kingston University



Hi everyone, I'm Nigel. My first role in an academic library, where I first worked with interlibrary loans, was my graduate trainee position at Brunel University Library. This was an exciting, sometimes hectic, and exhilarating year for me.

The most surprising thing here was accepting the fluid notion of librarian – I was giving classes, helping students find one of their shoes (it was never both, always just the one) and a lot of fixing technology and equipment (especially staplers!).

Before this I worked at The Literary and Philosophical Society Library in Newcastle – this was whilst I was completing an MA in Modern and Contemporary Literature and figuring out what I would like to do with myself, but it turns out I was already kind of doing what I wanted to do. I simply hadn't acknowledged it. After Brunel I found myself working at King's College London and at Kingston University, where I still am now.

I've really enjoyed trying to improve the interlibrary loan service, in particular the speed in which we can respond to items that we already have access to - both freely online but also items that we have in stock (this represents around one third of our total requests). I've made a customised search engine specifically for useful open access sites, but I'm still trying to work this problem out. We recently changed our LMS to Alma, and this has taken some getting used to, but the Analytics module has proved very useful in the past weeks and we are hoping to capitalise on Alma's potential in the coming year.

Outside of work I enjoy reading, watching films (especially at a cinema), and games of Scrabble and Trivial Pursuit with friends. Ideally Trivial Pursuit is an older version, somewhere around 1980, although Trivial Pursuit poker version is excellent fun.

I enjoy rock climbing, and until I moved to London I used to make it outdoors at weekends to somewhere in Northumberland or Yorkshire, depending on the weather.

This year I will also be starting my second year of part-time study at UCL for a Library and Information Studies MA.

FIL COMMITTEE MEMBERS NEEDED

We are always looking for enthusiastic people to join the committee.

The FIL Committee welcomes approaches from personal and institutional members to stand on the FIL Committee. The FIL Committee comprises interlending staff from all levels of seniority and experience, as well as observers from CONARLS, the British Library and IFLA and is a fantastic opportunity to learn more about interlending and document supply.

FIL Committee members serve for two years (and may be re-nominated for a further two years beyond this point). All travel and expenses related to attending FIL Committee meetings are covered for by the organisation. For more details on what being a FIL Committee member entails and the opportunities for professional development please contact us at:

fil.committee@gmail.com

Interlend 2015: Sponsored Delegates' Reports Molly Wilson. Hertfordshire County Libraries



I was fortunate enough to be awarded a sponsored place at the Fil conference: 'Interlend 2015 - Interlending at a crossroads?' held at the beautiful Midland Hotel in Manchester. As a relative newcomer to Inter Library Loans and the world of interlending, and never having been to a conference before, I boarded the early train in June not quite knowing what to expect from the next two days! I knew from the conference timetable that we had a packed schedule ahead of us, and as I arrived at

the amazing venue, we were straight into the action.

To kick off proceedings, our first speaker of day one was keynote speaker Ned Potter, with 'Visitors and Residents: useful social media in libraries', an engaging talk about how ILL departments can utilise the daunting range of social media platforms available, targeting output to best meet the broad range of users' needs and expectations. Some delegates were already using social media in their work, while some had little awareness of the wide variety of options available, each with its own advantages and disadvantages. It was interesting to hear how libraries the world over are turning to social media as an economical and creative promotional device.

Next we had 'Investigating Interlending: Resource Discovery, Sharing and Cooperation' from Briony Birdi and Sophie Rutter. Here we heard about the gathering of interlending data, with the aim of finding an explanation for the declining number of interlibrary loans across the board. Some contributing factors here are the shift to some resources being provided online free of charge, and increasing quantities of out of print items now being available as digital documents. Under increased budget pressures, there are two contrasting opinions on what the future holds for interlending: one being that the service is under threat because it is expensive and not self-sustained, and the other that it is an essential service because budgets are being cut - i.e. Acquisitions budgets will drop and resources need to be shared between libraries. Very interesting, and a lot to think about back at our libraries.

This was followed by a talk from Sarah Gould about EthOS, a service of which I had little knowledge. I learned that EthOS, a catalogue of theses, is expanding and improving. I was interested to hear about the service moving away from acting as storage collection and becoming more of a gateway to provide access to digitised theses stored by the originating institutions. EthOS seems to be going from strength to strength and I will know where to look next time I receive a thesis request!

After the break for (a very nice) lunch, we had an entertaining and informative talk from Gareth Johnson: 'Effective Communication Tips Everybody's Talking About'. Useful hints and tips on reading body language and signals to aid communication with library users, colleagues, and in groups. Some very intriguing ideas and suggestions!

Dawn Downes was next, to tell us about 'Revamping the Interlibrary Loans Department at the University of Winchester' and we heard how the old, outdated, paper-reliant system there has been transformed and brought up-to-date, now fully fit-for-purpose. For me, it was fascinating to hear how the decision was made to join ILL management system UnityUK. After assessing their needs and their borrowers' expectations, UnityUK was seen as the best option and it is so far working out brilliantly there. Winchester's ILL department are also using OCLC Worldshare for international requests, and this has been a success as well. We use UnityUK and OCLC Worldshare all day long at Hertfordshire Libraries ILL, as do many public libraries. There seemed to be some interest in the revamped system in the room, and we certainly find the two management systems discussed to offer a very valuable, good quality service here at Herts.

After a quick refreshment break, we were split into two groups: one to take a tour around the newly refurbished Manchester City Library and the other (which I was in) to hear Kate Ebdon's 'BL Update'. Kate spoke about the ongoing process of updating the British Library catalogue and ordering system, replacing BLDSS with BL On Demand. Again, here we heard how changing customer expectations are driving a change in operations. The ability to access downloaded documents across a range of devices is expected by customers now, and BL are working hard to meet these expectations. At Herts we can still only process documents supplied in hard copy from BL, but we're looking forward to the day when we can make use of the instant download facility! It was an interesting peek at what is going on behind the scenes at this renowned institution.

The final session of day one was with Chris Beevers and Su Fagg: 'FIL Benchmarking Project Workshop'. We heard about the benchmarking study which has been yielding plenty of valuable information and we saw some interesting comparisons between the sectors through the data presented. We were split into small groups for a workshop and were able to share examples of our working practices in our respective institutions. In our groups we talked through questions such as "what do you do to supply ILLs ASAP?" and "what would be an ideal and realistic service level?" which got us all talking! I myself was amazed to discover that in most university libraries, the first route to find a requested item seemed to be to go straight to BL! In public libraries, we use BL as an absolute last resort as we try other less costly routes first (typically systems like UnityUK, Talis and OCLC Worldshare).

After this, we were able (and certainly ready) to check into our rooms! Time to freshen up, and reflect on events so far before making our way back down for dinner. A lovely evening, with a good mix of delegates from different backgrounds at the table and a chance to

compare our viewpoints and experiences. Eventually it was time to turn in for the night - exhausted (in a good way) and wondering what day two would bring.

The next morning, after breakfast it was time for the second half of the programme. This commenced with the AGM, which I sat in on, followed by our first speaker of day two; keynote speaker Mike McGrath, to tell us about 'Threats and opportunities - navigating in stormy waters'. We heard about the problematic state of academic publishing, and the advantages and disadvantages associated with 'green' and 'gold' Open Access articles. Open Access is a subject I knew very little about, and it seems to be a very complex area. Working in a public library, the vast majority of interlibrary loans that we deal with are for books rather than theses or articles. It was an eye-opener.

Annette Moore was next with a presentation on 'Using Patron Driven Acquisitions to satisfy Interlibrary Loans at the University of Sussex'. So far, the project has been a success. Acquisitions funds are being used for specific items needed by users. We heard the ins-andouts of the process in place there; interesting to me particularly as at Herts we have been working on a PDA basis for a long time, purchasing hard copies of items our borrowers make stock suggestions for, and sometimes if we are unable to find a lender for an ILL item we will purchase it and add it to stock. Our system is more basic but functions well, and enables us to fulfil many requests we would otherwise have to regret.

The next talk 'The rise of open access - can interlending and document supply survive?' was from Lucy Lambe and was an engaging look at the different forms of Open Access, and how the proliferation of Open Access has the potential to impact upon ILL requests. Again, with a public library background I was on unfamiliar territory but I felt after this presentation I was able to understand a bit more what Open Access really means and what changes it may bring about. The campaign to encourage Open Access publishing in the long-term certainly seems a very worthwhile one, given that the aim of all we interlenders is to share knowledge!

After a break for lunch, we had Lisa Redlinski's talk 'Copyright'. The subject was demystified and made very accessible (quite a feat!). This session had everyone participating and really thinking about how to determine if something is likely to be copyright protected, and what to do.

We then split again into two groups, as we had done the previous day. Those that had been on the library tour already had a chance to hear the BL update and vice versa. I found the newly refurbished Manchester City Library to be an amazing building, and we felt privileged to be taken 'behind the scenes' into the temperature-controlled storage areas and hear insights from our friendly guide! The historic architecture is blended with new elements, to produce a modern space in touch with its heritage. The building is stunning and full of innovative touches. When we returned, there was time for a quick coffee before we reached the final session of the conference. To round off a very busy couple of days, we had Lynn Brown and Celia Hudson talk to us about 'Lean management techniques and ILL'. This was a fun session with a workshop element, and we heard tips and examples of how to cut wastage of time and resources in our working processes for a more efficient system. Many people in the room came away with practical streamlining ideas to take back to their departments!

As I made the (long!) journey home that evening, I reflected on all the information we had all taken in over the past two days. I was amazed by how quickly the time flew by at the conference. I had been a little concerned about the networking side of things, being a newbie, but everyone I spoke to was very friendly indeed and I was glad there were a few others who had never attended the Fil conference before. Chatting to others in the breaks was easy and fascinating - I was able to hear about the goings-on in the worlds of the NHS and university libraries, and share my own experiences from the public sector! I did feel that perhaps public and NHS libraries were somewhat underrepresented, and I would have liked to be able to find fellow public library delegates more easily in the crowd for a chat. Despite some initial nerves I really enjoyed the conference, and it was fantastic to learn more about the ways other ILL departments operate. It was a rare chance to meet and network with other ILL practitioners - a golden opportunity especially as we tend to operate as part of very small teams within our institutions. I would highly recommend the conference experience!

Jennifer Ball, Institute of Technology, Tallaght Dublin Assistant Librarian



As a sponsored delegate I was delighted to attend Interlend 2015 this year in Manchester. With future changes for my own Institute, I hoped that this conference would give me the opportunity to learn about current practices in other libraries, network with other librarians and hear about the trends that may impact ILL services.

The journey from the airport to Manchester City went without a hitch and I was very impressed on arrival in the city that there was a free city centre bus service – fantastic! With an impressive venue at The Midland Hotel my experience was positive so far, now for the conference. Ninety delegates attended over the two days and while this report gives a flavour of the subjects covered, the link at the end will bring you to the detailed presentations.

The keynote speaker was Ned Potter from the University of York and he spoke on the use of social media in libraries. He immediately demonstrated its usefulness by tweeting to those gathered that he was actually delayed in traffic!



Ned's talk inspired us with ideas about how we might use social media to engage with our students. A wide variety of social media can be embedded into websites to inform and interact with our users. Gathering statistics will enable you to track engagement and find out what works (e.g. comments, retweets). With twitter, the rule of thumb advised is that for every 4 tweets, 1 should be directly about your organisation. If you have something important to say, then tweet it more than once.

So what can we gain from looking at social media? Ned advises using RSS feeds, topical blogs and google alerts. Use the twitter search box to find the topics you are interested in and follow them. Most benefits are gained through interaction rather than just broadcasting and effective use of technology is not age related!

Brioni Birdi & Sophie Rutter presented findings from a CONARLS sponsored project investigating interlending, resource discovery, sharing and co-operation. It investigated

service provision levels, rationale for the services, as well as value for money. Library manager perspectives were also included. The views on a number of topics as well as differing ILL practices proved quite contradictory and confusing for the user. The result is lack of a national picture, making it difficult to develop best practice models and to benchmark.

Sara Gould's presentation on EThOS reflected on its original purpose. While its content and usage is growing, it now links more often to institutional repositories. Future developments are likely to relate to metadata and interoperability of repositories. After lunch Gareth Johnson gave a lively and engaging talk about effective communication. We heard about different types of communication and techniques to put into practice with our users in order to communicate our messages. Knowledge of your material and awareness of your audience are vital.

A case study from Dawn Downes (University of Winchester) gave us an insight into the practical changes implemented in her ILL department to make it run more efficiently. An update from Kate Ebdon on developments at BL showcased its revamped user interface "BL on demand". Finally, we were presented with an overview of the quantitative results from the FIL benchmarking project given by Chris Beevers and Sue Fagg. A breakout session explored qualitative data through questions posed to the delegates. The Conference Dinner was a great opportunity to talk in depth with some of the delegates and to relax after a packed day.

On day two, Mike McGrath gave a thought provoking talk about the transformation that has occurred to the ILL environment. He was quite positive that many of the threats to this service could be used as opportunities. Do we have the courage to re-visit the Big Deals or indeed walk away from them? Research commissioned (2011) would indicate that walking away from the Big Deal would not create a huge increase in the demand for inter-library loans as changes in user behaviour mean that they usually want instant access or nothing. This research also predicted that open access material would provide 10% of unsatisfied requests but it underestimated the impact of the large drive for open access. Mike also considered if the PDA model could apply to journals? Could libraries expose large collections of abstract only articles to their patrons and buy only those that are downloaded?

A case study presented by Annette Moore (University of Sussex) on the pilot use of Purchase on Demand Acquisitions (PDA) for satisfying ILL requests gave food for thought. Hearing the practicalities of how this service was set up and operates was extremely useful. At what point do you purchase? Can you set a purchase price limit? The PDA platform can analyse how people are using the materials (30% of loans were browsed for less than 5 minutes). Recent price increases will require the costs of this service to be re-evaluated. Lucy Lambe's overview of open access models and UK open access policies were very informative. We heard that students are using twitter to share publications peer to peer and were encouraged to use the web tool "open access button" providing analysis of where paywalls occur. Lucy pointed out some useful open access resources and the importance of integrating open access into our document delivery process. Our first afternoon presentation from Lisa Redlinski directed us to a great shared resource for learning more about copyright, helping to make informed decisions about what material falls under copyright and how they may be used. UK copyright has changed, enabling libraries to deliver material electronically. Copyright basics were covered and this talk instilled some confidence in dealing with an area that many find daunting.

A tour of the beautifully refurbished Manchester Central Library led us through some fantastic library spaces from café to media lounge and a music library where you have the option to play musical instruments. Even the movable book stacks were a visual treat!



Images from tour of Manchester Central Library

The final presentation of the day outlined LEAN management techniques to improve the ILL service at Nottingham University given by Lynn Brown & Celia Hudson. This technique examines processes with a view to identifying and eliminating waste. In addition to producing a more streamlined service, the technique has other benefits including a teamwork effort involving key ILL staff.

On reflection, the talks were well delivered and engaging. The subject matter was topical and I had particular interest in discussions around open access and the use of PDA for ILL supply. The conference theme came through well. Libraries are at a junction with numerous influences impacting on interlending services. Changes in user behaviour along with increasing availability of digital information and open access material have led to decreases in ILL demands. Staying informed about new technological innovations and social media will help us engage with our users and market our services. Do we continue with old outdated processes or embrace change and use it to our benefit?

I took away many practical suggestions from the case studies about marketing the service, reviewing processes and ensuring that open access resources are adequately used. At my own library, we try to ensure that our open access resources are checked through our discovery service but it is worth reviewing regularly. It was reassuring to see that our library has made good use of new technologies and social media. A review of document delivery suppliers and consortia options is something that should be carried out regularly. After discussions with other delegates, I will certainly revisit supplier options and costs to ensure that we continue to get value for money.

I would like to thank the FIL Committee for sponsoring my attendance at this very well organised and informative conference. Thanks also to the delegates for making me feel most welcome.

Presentations available: <u>http://www.forumforinterlending.org.uk/conferences-and-events/interlend-2015-presentations</u>

Would you like to be a Sponsored Delegate for the 2017 conference?

The committee advertises by email to all the members of the group, or you can check the website around March or April.

You need to submit a letter of application, which the committee will consider for one of the spaces available.

If selected the committee covers the cost of your attendance, all meals, accommodation and reasonable travel expenses. All we ask of you is for a report evaluating the conference that can be published in this journal as well as on the website.

Don't worry, we'll just offer free ILL requests instead!

Judith Walton, Durham University Document Delivery Service Supervisor



This is report to reassure anyone who is ever in the position to hear those dreadful words, "Yes we can do that, we'll just offer free ILL requests instead." Hindsight's a wonderful thing, so I thought that I'd share my recent experiences when, because of

a building project, Durham University Library had to put the majority of our printed journal collection into storage and satisfy demand via our Document Delivery Service (DDS). Like most of you, I had no idea what this might entail and when they told me I felt quite a bit of trepidation at the prospect. Over the course of the project there were a number of things which came as a surprise and there were a few things which I'd do differently in retrospect.

Background.

During the final stage of our heating and ventilation refurbishment project it was decided that rather than move our journals to a temporary location (only to move them back again); we would wrap the journals *in situ* and renovation work could continue around them. While the majority of journals are available electronically the Library agreed to obtain unavailable items via DDS and pass the charge on to the refurbishment project.

Academic departments were informed about the closure of the journal section several months in advance, the idea being that academics could plan their research and do copying and borrow hardcopy journals which they might require in advance. A letter was sent to Heads of Departments and the closure was raised at departments Board of Studies meetings It was also mentioned in the university-wide "Dialogue" e-newsletter. Flyers were created for the Library, giving details of why the journals were out of access and giving a link to the DDS request form for journals. Lastly a message was added to the online request form indicating that requests for journals in the affected area would be free.

What happened.

From 5th January 2015 the journals were wrapped in cling film and the requests started to come in. DDS staff had a list of the journals which were out of access (some 509 titles) and a list of the shelf marks which were not affected. We checked our incoming requests against local holdings (as usual) and any requests for items in the closed area had REFURB manually added to the "ship-to" field (a notes field which we use to record charging and delivery

information). When the data was exported into Excel, requests marked as REFURB could be easily identified. Requests were then treated like any other DDS request and sent to the British Library as our first port of call.

The project ended on the 13th April 2015. At that time, we cancelled the outstanding requests, collected items from the shelves, then I exported the data and sorted the Excel file to identify the satisfied REFURB requests for charging. Books and copies were charged at the relevant current British Library rates. No charge was made for the staff time involved in the project.

The project ran for about 2 and a half months, and during this time **we satisfied 418** additional requests: 87 loans and 331 copies.

Figure 1 shows the numbers of requests received each week during the project, with satisfied requests shown in the week they were requested rather than received. At the start of the project (admittedly in the Christmas holidays), we were averaging 4-5 requests per day or 20 requests or so per week. Once the term started the requests picked up to a high of 11 per day in week 4 and again in weeks 8 and 9 when the end of term essay writing began. The last week of term was week 11, but requesting did not tail off until well into the Easter break (Easter fell at the end of week 13 and the start of week 14 of the project).

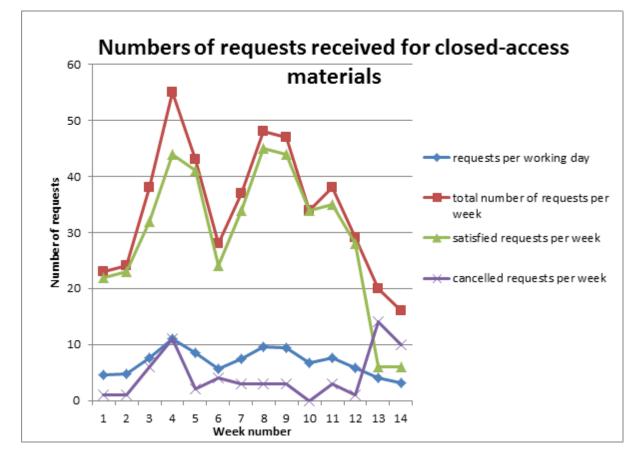


Figure 1. Requests made for closed access materials per week.

Patron type	Number of satisfied REFURB requests	Proportion of REFURB requests	Usual proportion of general DDS requests
Undergraduates:	170	40.7%	9%
Staff:	112	26.8%	35%
Research postgrads:	113	27.0%	42%
Taught postgrads:	23	5.5%	9%

Table 1. Number of requests made by different patron types and a comparison of theproportions of requests for closed-access materials against those of general DDS requests.

Department	Number of requests	Percentage of requests
History	49	11.7%
Chemistry	43	10.3%
English Studies	39	9.3%
Law	37	8.9%
Theology	34	8.1%
Classics & Ancient History	29	6.9%
Archaeology	19	4.5%
Physics	17	4.1%
Geography	14	3.3%
Modern Languages	12	2.9%

Table 2. Division of requests by subject showing the top 10 departments making requests.

We had no idea which departments might use the service most, but as the figures in Table 2 show most departments made some use of it. Surprisingly the service was used by Archaeology, History and Geography members: as their subject journals were still accessible during the refurbishment project. This shows that there is cross over of use into other subject areas that wasn't expected.

Two hundred and twenty-three individual journal titles were requested, with the most popular journals being requested 7 times. Law journals were particularly popular due to an assessed essay assignment which unfortunately coincided with the building work.

Whilst we were mainly concerned with how the journal closure affected our own students, we noticed a 30% decrease in the number of items which we were able to supply to other libraries' DDS requests (compared to the same period the previous year).

What we discovered.

- As we suspected getting hold of individual articles didn't prove too difficult. However, there were a few journals where we held the only UK copies. This not surprisingly was slightly annoying for the students.
- Students had problems finding the right request forms. Despite the flyers, students
 often used links to other request forms from the catalogue records. Unfortunately, the
 one they found was our Copy Service for Part-Time and Distance Learning Students
 which feeds into our ILL module. These are not in a format that can be sent to other
 libraries. Staff time was wasted moving these requests onto the correct template so the
 request could be sent out.
- Our monograph series are also housed with the journals, and because some students knew this they made the requests for these using the Journals form. This misapprehension was compounded by our advertising the link to the Journal request form rather than links to both Journal and Book. The problem arose as students filled in the book author/title in the article author/title fields and the series title in the journal title field. While we check all outgoing requests against our holdings, monographs appear in our catalogue under their individual titles. Checking from the ILL module using the series title, given by the student in the Journal title field, would not necessarily make a match. If we spotted the error before the request was sent to the British Library, then we moved the request to a Book form before transmission. However, many monograph requests were accidentally sent to the British Library as a request for scanning (SED99), so these initial requests invariably failed.
- We marked up each request as REFURB so that we didn't charge the reader when it was finally supplied. If our initial search didn't locate the item on the catalogue, then we would accidentally charge the reader. We found that this was particular problem when the student got the journal title wrong, or when they requested a monograph as an article in a journal. While charges were waived when the reader pointed out the mistake, it was a further source of wasted time.

- Students placed requests for journals which were not out of access. Whilst the core of our journal collections was under wraps, the History, Archaeology and Geography journals were still available in other parts of the building, so these requests had to be cancelled.
- Similarly, we received requests for items which were available electronically and these were also cancelled.
- Requests were placed by students who had never used DDS before, so there were the usual technical problems with downloading FileOpen, printing from SEDs and confusion when students try to move files between machines. The British Library staff were very good about resending documents, but it was another source of wasted staff time.
- While there is never a good time to do building work in academic libraries as someone, somewhere, is always starting research, January to March is a particularly busy time in Durham. We have a new intake of PhD students and our final year undergraduates start their dissertations.
- Locations of closed journals were not changed in our library catalogue because we could not do a global update, and a manual change was out of the question for such a short time. As a result of this DDS staff had to quickly learn which journals were accessible and which were not. In the end we had a better idea than most service desk staff, so we found ourselves contradicting our colleagues. When some journals were in a particularly inaccessible place in the library we found it easier to cancel the request, retrieve the volume and place it on our reservation shelf for collection. We found that if we didn't then they only placed the request again.
- Finally the project went on beyond the initial deadline. All our flyers, online advertising
 and web forms said that the work would be completed by 30th of March but this date
 came and passed. Extensions to builders' deadlines are only to be expected, but we had
 been repeatedly assured that the work would be finished on time. All we could do was
 start to be vague about when the area would reopen. and pass on new deadlines as we
 were given them. While we could not update flyers we updated the information on our
 web pages and request forms.

Unforeseen difficulties aside, the project went as well as could be expected with half the requested items being supplied on the same day/next day after requesting. Within three days 79% of all requests were supplied, so I believe that my team did well managing to minimise the inconvenience of not having instant access to the journals.

So what would I do differently next time?

The biggest difficulties we experienced centred around students placing requests on the wrong form, or giving details that differed from our catalogue records. Ideally, it would have been useful to link our DDS request forms to our catalogue so that bibliographic details could be automatically imported onto the correct form. We didn't do this because the

project was only going to be for three months and we were not sure what the scale of requesting would be.

If we were unable to make changes to the request forms, then it would definitely have been worth mentioning both Book and Journal request forms in the handouts. This would have reduced DDS staff time trying to unpick requests, which on investigation turned out to be REFURB requests for monographs, and reduced the number of times we had to move requests between templates.

We could have made more use of the flyers as an opportunity to mention the need to download FileOpen and try the SED test document before ordering. Whether this would have worked is debatable, as our request forms already recommend trying the test documents and we all know that students often ignore messages like this.

Conclusion.

All in all, I don't know if we saved any money by doing DDS requests instead of moving the collection twice even if we had the space to do so. Should we ever have to repeat this exercise I would be confident that we could handle the extra requests with the available staff, as an additional 400 requests over 3-4 months was nothing like the level of requests that I had initially feared. I wouldn't have liked to try this project 20 years ago, but today's reliance on e-journals made this easier to do than I had expected, and the project as a whole proved to be nothing to be feared. So if someone should ever say in a meeting, "Yes we can do that, we'll just offer free ILL requests instead," rather than hide you can reply, "Piece of cake!"

Implementing EHESS and BL DRM

Saskia Van Elburg, Plymouth University Library & Digital Support Team Leader (Content and Licensing)



After 31st December this year the British Library and Copyright Licensing Agency were replacing the Higher Education Scanning Service or HESS with the Enhanced Higher Education Scanning Service or EHESS, so there will be no choice but to move to it. The benefits of changing to EHESS were so obvious that we adopted the new service early. Taking up the pre-payment option our costs remained the same while the quality of the service and the

content improved considerably. All we had to do was swap some funds around in our Library Management System, and agree on a first deposit amount to pay the CLA (Copyright Licensing Agency).

The improvements are:

- 1. 48-hour turnaround guaranteed
- 2. Metadata included
- OCR (Optical Character Recognition), so editable, searchable, and better for visually impaired users
- 4. DRM (Digital Rights Management) free
- 5. Higher quality text and images

There are a couple of things to bear in mind:

- EHESS standards do not extend to ordinary ILLs
- If you decide to set up a pre-payment account with the CLA, you will be charged VAT on the deposit amount.

The 48-hour turnaround has enabled us to improve our key performance indicators in this area, and so far we have experienced almost 100% adherence to this standard. This improvement in delivery time is great, not only for the faster service but the fact that it is predictable and consistent.

We are lucky that in using Talis Aspire Digital Content there is an application performance interface with the British Library which lets us see availability immediately the order is placed, so we know straight away if we need to use a different source. (It has not yet 'caught up' with the EHESS changes as far as times and prices are concerned, so it still displays the old expected delivery dates and incorrect prices, but as there are only a few staff operating it this doesn't really matter – we are all aware of the real delivery times and costs). We only create our own scans or allow requestors to upload theirs as a last resort, as

we want to be consistent in providing the higher quality EHESS content, partly as a means of encouraging use of our Talis Aspire digital content module.

The new DRM SED (Secure Document Delivery) system from the British Library

On the whole this has been very successful, mainly due to the discontinuance of the FileOpen software, which was usually the cause of our customers' issues with downloading and printing.

As is usual, we have not received any positive feedback about the new process but we have received some queries and complaints about it! So, if you're going to switch over, it's probably wise to be aware of the issues we have experienced.

The queries were initially mainly from customers who had already been using ILL for a long time and found it difficult to adjust to any change, even though it was a positive one. They are worth mentioning because we also still get the same queries from relatively new users. They do not seem to mind having to register with the BL, but they are prone to misreading the instructions about how to do it. To some extent we feel that this is the fault of the instructions, which are not really aimed at our (HE) customers in particular but at all BL customers. The instructions are slightly misleading visually – some customers tend to click on the 'Download' button *before* registering, which results in the request not working properly, and also quite naturally expect the registration to be instant, whereas in fact it is sometimes necessary to wait for 10-20 minutes for the registration to 'take', before downloading the document.

There are a few other minor niggles as well, so that in the end we created our own troubleshooting cover email to be sent out with the SEDs, including the following information:

- Register for BL On Demand first, **<u>before</u>** clicking on the Download button, otherwise the download will not work.
- There is a delay between registration and being able to download the first time. Please allow 10-20 minutes before trying to download.
- If you are using Google Chrome you must disable the PDF Viewer.
- Make sure you have Adobe 10 or 11 in some recent cases Adobe has not been working correctly and hasn't enabled access to the document.
- It may be worth trying a different computer to download.

I have communicated with the BL several times about the need to update their instructions and was assured that they understood and would be changing them, but they did not give me a date for this, which is difficult as the ILL staff having to deal with several queries a week.

FIL Benchmarking Project

Chris Beevers and Su Fagg

Introduction

The final results of the FIL Benchmarking Project were presented to the Interlend 2015 conference held in Manchester in June. Delegates to the conference were asked to consider the main themes emerging from the survey, with a view to exploring best practice within the UK interlending community of the UK. An in-depth analysis of the survey findings was presented in a previous issue of this journal (Beevers 2015).

For brevity, a summary of the findings is produced here:

- Fulfilment rates seemed highest in the Health libraries, closely followed by Higher Education (HE), with Public libraries finding article requests particularly difficult to complete. The wider range of materials is likely to have influenced these figures.
- Whilst Health and Public libraries in the survey supplied a high proportion of articles electronically, this figure varied more across the HE sector.
- Supply times in the Health sector tended to be much quicker than in HE or Public libraries, although the latter searched longer, which possibly influenced fulfilment rates.
- Staffing levels did not necessarily affect success or speed, with many services relying on less than 1 full-time equivalentLi, although the range of staffing levels was widest in HEIs.
- In terms of supply route, some 64% of those surveyed used the British Library (BL) first, with a similar percentage checking that items were held with the BL before sending any requests.

The findings led the authors to ponder the best way to consider each of these in some detail, whilst making them of relevance to the interlending community. The annual conference, Interlend, is organised by FIL, and seemed an appropriate event for any discussion. In order to involve as many of the delegates as possible within the limited timeframe of the conference programme, it was decided to adopt a workshop approach.

The aims of the workshop were:

- To identify characteristics within the workflows of some libraries which explain their high (or low) performance.
- To define a toolkit for benchmarking ILL performance indicators in the future which can be used by libraries in any sector.

Workshop

Originally, the workshop proposal was designed as a parallel session for approximately 30 delegates. We were somewhat flustered to be given a main slot for all delegates, numbering over 80. The logistics of the workshop therefore had to be re-configured, made possible by the availability of an additional, 'break-out' room. On the day, the 85 delegates were divided into two groups, one to remain in the main conference room and the other to go to an adjoining meeting room.

Once thus divided, the groups were split into smaller units of approx. 7-8 delegates. As it had been impossible to 'randomise' the groupings, delegates from the same organisation were requested to join different groups. The intention was to obtain a cross-sectorial presence in each discussion group, although there was a natural bias towards the HE sector, since they always send the most delegates. (Of the 89 names on the delegate list, over three-quarters (69) represented HEIs. Public library services accounted for just 7% with 6 delegates, whilst Health libraries made up 5% with 4 delegates). Each of the 10 groups had 15 -20 minutes to discuss the key question allocated to them. A scribe recorded the main comments on flipchart paper, for sharing later.

Five questions were asked, one for each of the groups in the two rooms:

- What does your library do to enable you to supply ILLs asap?
- What does your library do to ensure you fulfil as many requests as possible?
- What do you think is a realistic service level: To promote to your own customers? To publicise to other libraries?
- How do you assess what your users want from your service? And how do you find out whether they are satisfied?
- Do you market your ILL service to all your users or to certain groups of customers?

After 20 minutes, the delegates re-convened in the main conference room, and a discussion around each of the questions was led by the authors. Volunteers from each of the groups reported back on the main factors contributing to their responses. This sparked debate amongst delegates across the room.

(The responses were photographed at the end of the session and are attached as Appendix 1.)

Considering each of the questions in turn:

What does your library do to enable you to supply ILLs ASAP?

The benchmarking survey found little correlation between the speed of turnaround on requests and obvious factors such as staffing levels. Process seemed to be the key. Checking a succession of possible sources, including the home collection, before requesting, cut down

on the time taken to get a response from a supplier. E book rental as a fulfilment route is also becoming more widely considered. A paper presented at the conference was based on a pilot scheme detailing just how such an approach works (Moore 2015). Setting processing times to, for example, 24 hours can have implications on staffing, requiring more staff to be trained for interlending duties than has been accepted historically. This move comes with the development of more 'document delivery' services, which encompass other library services such as digitisation, alternative formats, resource lists etc.

Interestingly, both groups discussing this question mentioned sending requests to the British Library before trying other sources. The ability to have articles delivered directly to customers through the Secure Electronic Delivery 'add address' service was mentioned as an obvious way to speed up the process.

The use of union catalogues, institutional repositories and Google Scholar were all mentioned as ways to speed up searches, and often supply times could be cut by using electronic formats. Consortia arrangements often meant that these requests were given priority over requests for supply from libraries not in the groups.

Mention was also made of giving priority to their own requesters over those from other libraries, something that may be expressed in service agreements.

What does your library do to ensure you fulfil as many requests as possible?

This discussion again ranged over the process each library undertakes to source each request. The main consideration seemed to be requesting items from libraries that actually have them! This may sound obvious, and can mean more work processing each request, but it does lead to higher fulfilment rates. Union catalogues, such as COPAC, SUNCAT and WorldCat were consulted to establish where items were located, and to give an indication if lending was a possibility.

Other immediate solutions include purchasing an item, usually if under a certain prearranged cost, or leasing through an e-book provider. Consortia members found sharing catalogues helped to source items successfully, especially amongst the Health libraries. Public libraries are able to avail themselves of Unity UK, which lists the holdings of most public libraries in the UK. All of this allows libraries to request from the most likely holding library, again improving the fulfilment rate.

The British Library remains the first port of call for many operations, with some using the FIFM and GIFM services now offered. These enhanced searches were particularly welcomed by small interlending teams or sole practitioners who could offset the added expense against saved staff time.

Other ways of targeting requests to libraries more likely to supply included using the specialist lists maintained through JISC, and /or sending 'speculative requests' to particular libraries known to hold the item.

Good housekeeping was also mentioned as being important. For example, wasted messages can be reduced by keeping note of those libraries notifying the lists that they are suspending their service for whatever reason. Following up requests after the 'courtesy' two weeks' time has lapsed serves as a useful prompt, and again reduces unnecessary searching and emailing.

Finally, some delegates found items by contacting publishers, authors or learned societies directly.

What do you think is a realistic service level: To promote to your own customers? To publicise to other libraries?

Many interlending services are part of libraries that are seeking recognition of their activity by means of outside quality standards and awards. The importance of Service Level Agreements (SLA), customer charters and the Customer Service Excellence Awards are all leading managers to consider aspects of the service offering.

As expressed in the question, it was agreed that there are two parts to this; what can be expected by the libraries' own customers, and the level of service offered to other libraries.

In general, the discussions ranged around managing expectations, by having realistic service levels that can be updated as variables, such as the Library Management System. As one delegate noted, "Don't make promises you can't keep!" There was also the recognition that many of the factors are beyond the control of individual libraries, with postal or courier services being particularly important in calculating supply times.

Delegates from organisations currently operating SLAs set their own desired 'processing' times and then added the average supply time achieved by their major supplier, usually the British Library.

The importance of keeping requesters updated on the progress of their requests, especially if any delay was anticipated, was stressed as a way to avoid negative feedback.

In terms of supplying other libraries, some aimed to respond within 48 hours, whilst others responded within 'reasonable times'. At certain busy times of year, own customers took priority, but details could often be found on service websites, so that any enquiring library would know beforehand.

It was interesting to note that the FIL guidelines still play a part in shaping the operations. These are available on the FIL website at <u>http://www.forumforinterlending.org.uk/best-practice-guidelines</u> How do you assess what your users want from your service, and how do you find out whether they are satisfied?

Most delegates reported that surveys of user needs, and satisfaction rates, tended to be done as part of an overall Library Survey, rather than something aimed specifically at ILL users. Nonetheless, a variety of means to ask for comments were mentioned, including user and staff feedback, VOX pops, focus groups and general surveys. The use of social media for quick votes and asking questions about the service is also growing.

Users appeared to value:

- Speed of service
- Value for money (whether free or charged)
- Range of material that can be sourced
- Convenience
- Access to online information and request forms
- Quality of service
- Options
- Good communications

Do you market your ILL service to all your users or certain groups of customers?

Marketing is always a popular topic at Interlend, and was the main theme of last year's conference.

As with SLAs and surveys, much of the marketing of interlending takes place as part of the more general promotion of the library and its services. An online presence took the form of prominent links on organisations' homepages, separate ILL webpages and the use of social media. Articles for the library blog were specifically highlighted, often providing an ideal opportunity to get the 'interlending' message across.

HEIs had a library presence at events such as University Open Days, Fresher's Fairs and during student induction activities. Delegates also spoke about the use of student ambassadors and library champions for word-of-mouth promotion of services.

Paper-based promotion was still very much in evidence, with mention of guides, leaflets and posters being produced, either for display in the library, its surroundings, or targeted at specific events. One suggestion was the use of leaflets being placed in loan items, both to promote the service and to ensure that borrowers were made aware that the items came from elsewhere. This could also be a useful way of surveying actual users of the service.

Surveys and focus groups were also mentioned as ways to promote the service through the interaction of staff and respondents. Other activities included conferences and networking events, either internal or external. As this discussion was taking place at a national conference, recognition of the importance of this in marketing services was to be applauded!

Conclusion

As with many of these surveys, the number and range of respondents can influence the nature of the findings. However, by exploring the main issues with a broader group, the delegates to a national conference, it is clear that some similarities exist across the sectors.

By far the most successful libraries seem to be those in the NHS. By having merged catalogues, libraries are able to find a location holding a request, and have it supplied electronically in most cases. This improves both the fulfilment rate, and speed of supply over the more disparate sectors, most of whom rely on the British Library as first choice for supply.

As major contributors to both the Benchmarking survey and the conference attendees, HEIs need to explore the differences in their performances, and the reasons for this. Put simply, staff numbers and available budgets do not explain the range of performances, although it has to be admitted that user profiles etc must play important roles here (in terms of the nature of requesting, returned requests, percentage of research students etc).

Other presentations at both this and previous Interlend conferences have explored aspects of the whole interlending process and how it can be streamlined to meet today's expectations. It is to be hoped that some of those services showing particular traits of best practice within their sector can be encouraged to write in this journal about their processes and approaches, in an attempt to establish guidelines for everyone to see and compare individual performances.

The authors hope to be able to report on the possible toolkit that emerges from all of this combined effort in a future issue.

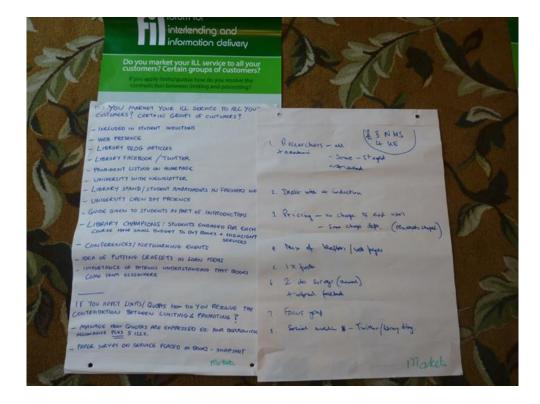
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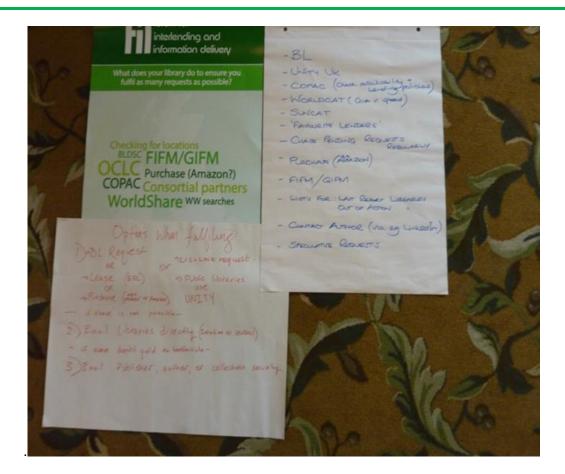
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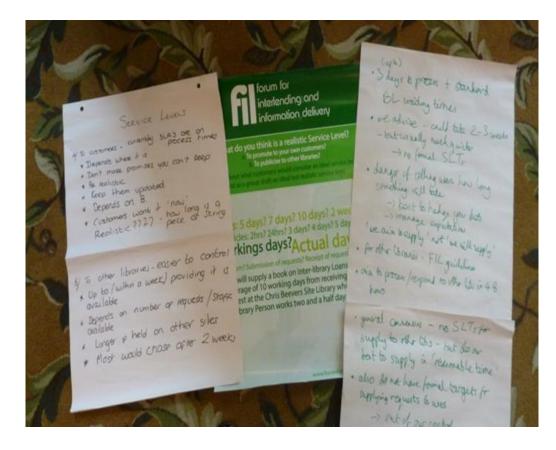
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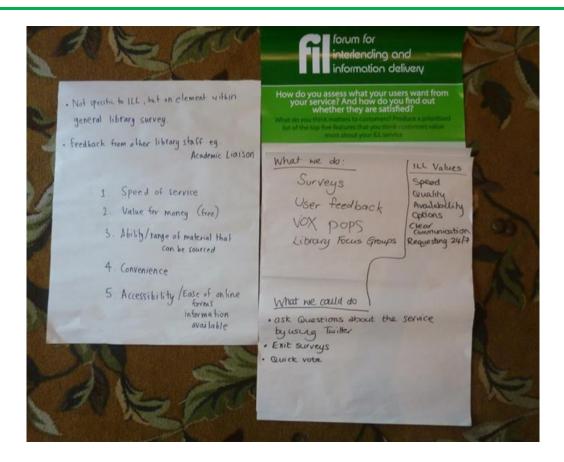
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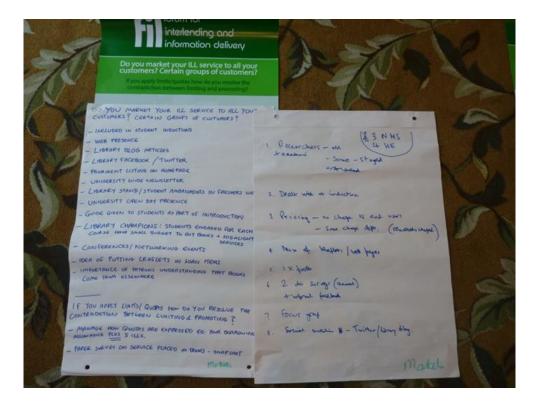
Appendix 1. The completed flipchart sheets from the workshop: 2 for each question.











An Interlending Reflection

Tim Peacock, University of Derby

When I began in this role, interlending was a much simpler creature. A number of requests cards moved inexorably across desks, a 'signature' was noted and a few BL 'reports' were manipulated. I might even have taken a phone call from an ill student wishing to report in sick. At that time Derby's inter library loan 'manual' comprised 22 scant pages. It now extends to 146 and rising, with few pictures and no cartoons. So, I guess this will strike a chord with you all, about the extent to which the depth and process of interlending has changed and advanced from one millennium into another.

Keeping staff up to date with developments is an ongoing process, particularly when multiple sites are involved. I would always say to new ILL staff that it will take a year of part time work to visit 80% of interlending processes at least once and my advice has always been, 'If you're not sure, give me a ring'. I say telephone rather than email, for as we all know, any email, longer than a couple of sentences, is either not going to be read, or will be misunderstood. I've always worked at the larger campus here at Kedleston Road but Derby has three others: Britannia Mill, which has all the interesting books; Buxton, which has excellent food but is constantly under poor weather and snow and

Leek, which has yet to figure greatly in our local ILL activity. Keeping these connected has always been a priority. I'm sure that those of you who deal with multiple sites will understand.

We had fun times here at Derby, constructing our own online request form by dragging together authorization, validation and authentication into some sort of e-signature. Some of you may recall that I waxed lyrical on the subject at the Lancaster FIL event. I remember Graham giving me a 'five minute to go nod' which, in my enthusiasm, I interpreted to mean, 'You're doing really well, keep going'! I must have shut up at some point.

Then there was Queen's at Belfast, a meeting of the BL Higher Education Group and an allexpenses paid Ryan Air trip. It was Easter and chilly, but Barry and Pavan were excellent hosts and provided us all, along with bacon bagels, the gift of an Easter Egg, a quality one too, with a bomb proof chocolate shell. However, this was not believed by the security lady at George Best who, with little delicacy or hygiene, insisted on emptying the box and stripping away layers of classy foil, breaking open the egg and removing each Belgian praline presumably to determine its explosive capability. At least she didn't bite one for efficacy! Queen's library is a delight, but then, Derby's is too and we are not unique. Over the years we've requested some interesting items. The Office of Australian War Graves has been prompt, polite and very proficient in its supply and the BL has been good in providing much information about the use of horses during WW1, way before the advent of 'war horse'. Derby is rightly proud of its Forensic courses and we were pleased to fulfil articles about and, fortunately, not containing, blood splatter patterns from the Royal Canadian Mounted Police and ear prints from police in Finland. I have always enjoyed the outward looking nature of interlending and remember Mike McGrath saying on York Railway Station one March, 'We're the library's gatekeepers you know'! I shall feel a decided loss of power when I can no longer raise or lower the University's 'portcullis'.

Do you remember Hayes? I know you do, as some institutions still say 'No return by Hayes', even though it hasn't existed for years. I can well understand this and the phrase, 'Off the

back of a lorry'. Derby sent a box seven items back to BL with 'Hayes DX' one July. It went missing. Some weeks later I received a call from a colleague that it had been found on a Derby roundabout and handed in at Derby Libraries. It had obviously dropped from an opened doored HayesDX van in the heat of that July afternoon. What is more concerning, I understand, is that at that time, HayesDX would also transport body parts for transplant. Fortunately, and again I quote from a colleague, 'In libraries, no one dies'!



Could I hear a collective sigh regarding missing items? Fortunately, we've had very few, especially of the lost BL variety. One student returned a BL volume of bound journals, which was unknowingly 'shelved' in our periodical stack. Rather than pay the weighty BL price, I found a like for like item in Australia, had it shipped and duly forwarded to BL. Some years later the Stack was completely emptied and re-ordered (pictured) and then, some years after that, the original missing volume turned on my desk. I returned it to BL. I'm still



awaiting the refund!

Where does Derby currently rest on the interlending continuum? Online requesting is now fully in place, is robust and is well received. We use SED as a default and have embraced BL's On Demand DRM Lite. There have been a few individual registration hiccoughs with this, but it is pleasing to report the departure of ADE and FileOpen with quite a sigh of relief. We are now, almost, paper free! We've also been able drastically, to reduce the six years and a day card request archive. Most requests can now be stored electronically for

this time period. The one area which, sadly, remains lacking, is online request payment and this is on the agenda. Request numbers over recent years have been good but this term has been rather slow to get going and requesting is being closely monitored.

Colleagues: I will be retiring from the University of Derby at the end of this 'term'. A big thank you to you, for all your help and support over these interlending years. May the service continue to grow and excite both readers and protagonists. Rest assured, that as a senior citizen rail traveller using St Pancras, I will continue to use the world's best 'waiting room'!

The photographs are mine. Line drawing, courtesy of Helen Millington

CALL FOR SPEAKERS

FIL@BLDSC November 2016 (TBA) British Library, Boston Spa

The FIL committee invites applications from the inter-lending community to speak and/or run breakout sessions or workshop sessions at the annual British Library Boston Spa event. Sessions are typically 30 minutes long and can be tailored to meet the speaker's needs – either chalk-and- talk or workshop based.

Topics might include:

- Interlending tools and systems
- Service development and practical solutions to ILL problems
- General trends in ILL

Speakers will be able to attend the event free of charge along with all reasonable travelling expenses.

Please send a 500 – 800 word abstract detailing your proposal to sandrad@essex.ac.uk or fil.committee@gmail.com .

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