



## Rethinking Resource Sharing Star

STAR Checklist: Version 2, Updated 2015

If your library became a STAR under version one of the STAR Checklist, rest assured, you are still a STAR! However, we encourage you to see if you can achieve yet another STAR by filling out the updated version below.

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

The STAR Checklist is designed to be aggressive, challenging library decision-makers to live on the front lines of rethinking resource sharing. There is no expectation that a single library will meet every item in the list. While aggressive, the Rethinking Resource Sharing Initiative also recognizes that achieving STAR status should be attainable.

Instructions: Consider printing the Rethinking Resource Sharing STAR Checklist so that you have time to consider each question, and indicate if the library is presently engaged in the activity/initiative/service/policy listed (2 points), or if there are plans to implement in the next 12 months (1 point), or if the library is not engaged with it (0 points). After reviewing the checklist, submit your answers online. Aggregated data may be used in future presentations or publications.

Scoring: The highest possible score is 200. There are four STAR levels: 1 STAR: Participating libraries that score between 120 and 139 points are engaged in 60%+ of activities/initiatives/services/policies represented in the Checklist and qualify for one STAR. 2 STARS: 140-159 points reflect engagement in 70%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for two STARS. 3 STARS: 160-179 points reflect engagement in 80%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for three STARS. 4 STARS: 180+ points reflect engagement in 90%+ of activities/ initiatives/services/policies represented in the Checklist and qualify for four STARS. All

STARS receive the Rethinking Resource Sharing STAR certificate and letter of recognition which affirms a library's commitment to rethinking resource sharing. This certificate can be shared with your library administration to help demonstrate that you are keeping up with best practices in resource sharing. If your library qualifies, a member of the Rethinking Resource Sharing Initiative will be in touch! If you have any questions about the items on the checklist, please contact: \_\_\_\_\_

Your name

Your email address

Your institution/the name of your library

## **RRS Manifesto 1: Ease of Resource Sharing**

**Restrictions shall only be imposed as necessary by individual institutions with the goal that the lowest-possible-barriers-to-fulfillment are presented to the user.**

Q1 Library accepts fax or email requests from other libraries.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q2 Library accepts requests from electronic resource sharing systems (i.e. OCLC, Docline or others.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q3 Library's physical holdings (including monographs, microforms, audio/visual materials, special collections, and other physical collections) are up-to-date within a year in resource sharing systems.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q4 Library's electronic holdings (including ebooks, e-journals, and other electronic content) are up-to-date within a year in resource sharing systems i.e. using OCLC's Knowledge Base or Rapid ILL, Relais D2D.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q5 Library responds to/updates lending and borrowing transactions within an average of 24 hours.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q6 Library accepts requests through regional or consortial resource sharing systems. i.e. Ohiolink (Ohio libraries); UBorrow (Big-10 Universities/Committee on Institutional Cooperation); Racer (Ontario Council of University Libraries.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q7 Library participates in local or regional courier services whenever appropriate. (Library considers cost, turnaround-time, consortial obligations, and risk of loss in determining best delivery method.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q8 Library's lending policies and contact information are up-to-date, reviewed regularly, and posted within resource sharing systems AND on the library website. Generic email addresses rather than personal email addresses are recommended.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q9 Lending library uses ISO (International Standards Organization)-compliant resource sharing system. i.e. ILLiad, Relais.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q10 Library provides access to an online catalog open for searching by all.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q11 Library provides widgets, bookmarklets, or other webtools that connect local borrowers to library collections and resource sharing services from the open web. (i.e. LibX toolbar, Zotero.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q12 Library's current electronic holdings (including ebooks, e-journals, and other electronic content) are discoverable in a national or global level catalog such as [www.worldcat.org](http://www.worldcat.org).

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q13 Library's new physical holdings (from the point of joining the national or global catalog onward) are discoverable in a national or global level catalog such as [www.worldcat.org](http://www.worldcat.org).

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q14 Library's retrospective physical holdings (pre the date of joining the national or global catalog) are discoverable in a national or global level catalog such as [www.worldcat.org](http://www.worldcat.org).

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q15 Library utilizes OpenURL resolver to help connect users to full text resources and ILL services.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q16 Library provides links to locally digitized collections in the online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q17 Library provides links to commercially purchased content in the online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q18 Library provides webscale discovery tool that allows users to search across electronic and physical collections.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q19 Library's electronic holdings (including ebooks, e-journals, and other electronic content) are up-to-date in the local online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q20 Library's new currently received physical holdings (including monographs, microforms, audio/visual materials, special collections, and other physical collections) are up-to-date in the local online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q21 Library's retrospective physical holdings are up-to-date in the local online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q22 Library processes user requests within an average of 24 hours

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q23 Library provides method for users to initiate requests for materials from within the local online catalog.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q24 Library has enabled unmediated resource sharing requests, processed without staff intervention. (i.e. OCLC Direct Request.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q25 Library utilizes an OpenURL resolver to facilitate requests for content discovered in databases/indexes not available in full text. Examples: SFX by Ex Libris, WebBridge by Innovative Interfaces Inc., Article Linker by Serials Solutions, etc.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q26 Library provides status requests online for local borrowers.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q27 Library's borrowing policies and procedures and commitment to service standards (e.g. turnaround time, borrowers served etc.) are posted online. Every effort is made to explain reasons for the policies and expectations regarding policies to local users.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q28 Lending library has extended loan period (beyond traditional 30 days.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q29 Library provides local borrowers with timely notification of impending due dates.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q30 Lending library provides borrowing libraries with timely notification of impending due dates.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q31 Library uses interlibrary loan to request locally held items which are in use by local borrowers.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q32 Lending library allows unlimited renewals for items not needed locally.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q33 Lending library limits loans to In Library Use Only as infrequently as possible and makes such limitations clear to potential borrowers.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q34 Borrowing library follows In Library Use restrictions when items are received with such.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q35 Library provides same level of service to all local borrowers.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q36 Borrowing library allows for remote renewals by local borrowers, either online and/or via telephone.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q37 Borrowing library fills requests with local material when possible (i.e. places holds or scan and deliver/document delivery.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q38 Borrowing library provides email notification when a request is received and in processing.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q39 ILL staff make departmental contact information readily available and answer questions via departmental email and telephone.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### **RRS Manifesto 2: Options**

**Library users shall be given appropriate options for delivery format, method of delivery, and fulfillment type, including loan, copy, digital copy, and purchase.**

Q40 Borrowing library delivers materials to distance researchers/borrowers (sabbatical, field work), broad range of borrowers regardless of location.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q41 Library lends and borrows e-books as per license terms/advocates for rights to lend e-books through ILL.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)



Q42 Library considers lending reference books or bound periodicals (perhaps as short term in library use loans.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q43 Library considers buy-on-demand, as appropriate, before sending requests to library suppliers.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q44 Borrowing library offers local borrowers options to select location for delivery of requested returnable items.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q45 Borrowing library allows for direct delivery of returnable materials from the lending library to the local borrower.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q46 Lending library will provide non-returnable items to borrowers via online delivery, using email or other means.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### **RRS Manifesto 3: Global ILL**

**Global access to sharable resources shall be encouraged through formal and informal networking agreements with the goal towards lowest-barrier-to-fulfillment.**

Q47 Library loans non-returnable items to libraries outside of home country.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q48 Library loans returnable items to libraries outside of home country.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q49 Borrowing library sends requests for local borrowers to libraries outside of home country.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### **RRS Manifesto 4: Share More**

**Sharable resources shall include those held in cultural institutions of all sorts: libraries, archives, museums, and the expertise of those employed in such places.**

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

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q51 Lending library loans microforms.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q52 Lending library loans A/V materials. Examples: CDs, DVDs, VHS tapes.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q53 Lending library digitizes items that cannot be loaned physically, within the confines of copyright and other legal restrictions i.e. digitizes public domain content and delivers electronically when physical loan is not possible.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q54 Lending library loans whole issues of magazines/periodicals and/or bound journal volumes.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q55 ILL staff is aware of the sharing permissions of the licensed content at the library.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q56 Resource sharing staff provides input on license language for electronic content acquired by the library.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q57 Lending Library loans new items.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q58 Lending Library makes every effort to loan unique items where there are very few owning libraries.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q59 Library makes open access/public domain information discoverable and shares it with users.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### RRS Manifesto 5: Adding Value

**Reference services are a vital component to resource sharing and delivery and shall be made readily accessible from any initial “can’t supply this” response. No material that is findable should be totally unattainable.**

Q60 ILL staff provides assistance to users or refers users to reference librarians to help determine alternative resources when an item cannot be borrowed.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q61 ILL staff provides information on borrowing trends to collections staff to help inform collection development strategy.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q62 ILL staff informs cataloging/metadata/e-resource management services staff of records with outdated or incorrect holdings discovered during borrowing and lending workflows.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q63 ILL staff consult with stacks maintenance/circulation staff when material is missing.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q64 ILL staff contribute to evaluating and implementing request mechanisms in emerging discovery systems.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q65 ILL staff is knowledgeable of applicable intellectual property/copyright standards and assist users by helping locate appropriate resources and/or referring to additional services to help determine rights.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

## RRS Manifesto 6: Managing Costs

**Libraries should offer service at a fair price rather than refuse but should strive to achieve services that are not more expensive than commercial services, e.g. bookshops.**

Q66 Lending library allows free sharing of materials whenever possible

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q67 Lending library charges reasonable fees that encourage, versus discourage, resource sharing.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q68 Lending library does not maintain a separate fee schedule for unique materials.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q69 Lending library notes all fees for lending in appropriate resource sharing sites (i.e. OCLC Policies Directory) and/or on library website, including fees for unique materials.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q70 Lending library ILL staff has the option to waive fees to encourage supply of materials.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q71 Library uses electronic fund exchange system to manage fee transactions. Examples: OCLC IFM or DOCLINE EFTS.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q72 Library uses IFLA (international Federation of Library Associations) vouchers with libraries outside of home country, in lieu of complex currency transactions.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q73 Library participates in reciprocal agreements with other libraries and/or joins consortia.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q74 Library accepts credit cards for payment of transaction fees.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q75 Library has credit card for staff to use to obtain materials.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q76 Library does not charge local borrowers for basic ILL service.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q77 Borrowing library pays or subsidizes ILL fees for loans, copying or digitization.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q78 Borrowing library pays or subsidizes copyright fees.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

## **RRS Manifesto 7: Everyone Can be a Library User**

**Library registration should be as easy as signing up for commercial web based services.**

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

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q80 Library provides online request form for libraries outside of the library's primary resource sharing system.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q81 Library has online means for local borrowers to register for interlibrary loan service.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

## **Unofficial RRS Manifesto: Keep Rethinking!**

### **Privacy/Security of Patron Information**

Q82 To ensure privacy, borrowing library follows same standard borrowing/check-out protocols for ILL items as for locally held circulating items. (Patron name may be visible but title should not be if in public area.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q83 Library purges records or removes patron name information from requests that have been completed according to local records management standards and practices.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q84 Library takes appropriate measures to protect database of patron's borrowing transactions from outside intrusion or hacking.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### **Evaluate Services**

Q85 Library understands and manages borrowing and lending volume/activity to balance local needs with responsibility to larger community.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q86 ILL staff uses and shares statistics (lending/borrowing volume, unfilled/filled, turnaround time, etc.) to analyze workflows, increase efficiencies, and outline costs/needs.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q87 ILL staff considers and understands demographics of user community to provide customized services where appropriate.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q88 Library staff evaluates user needs and user satisfaction.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

### **Training and Staff Development**

Q89 Library is aware of and honors applicable national ILL codes and guidelines (ALA ILL Guidelines, IFLA Guidelines, CONTU Guidelines.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)



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

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q91 Library promotes professional development for staff including conferences, involvement in listservs, etc.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q92 Library reaches out to vendors for support when necessary.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q93 ILL staff are encouraged to seek out mentors.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q94 ILL staff mentor other ILL colleagues.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q95 There is a professional librarian overseeing ILL.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q96 ILL staff are careful when scanning to check for quality.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q97 Interlibrary loan department ships materials packaged to protect contents (either themselves or through a mailroom) and to the appropriate address.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q98 Library attempts to promptly contact and consult lending or borrowing library when any problems arise.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q99 Library supports ILL department by providing sufficient staff and appropriate equipment and supplies.

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Q100 Library pursues inventive methods to get items returned (i.e. fine moratoria, etc.)

- We do this now (2)
- We plan to implement in the next 12 months (1)
- We do not do this (0)

Does your library do anything else to facilitate the sharing of information among libraries?  
Please tell us about your own inventive practices and innovations. \*This optional item will not affect your score!

Do you give permission to feature your inventive practice on the Rethinking Resource Sharing Initiative website?

- Yes! (1)
- No (2)