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**Did we get it right?  
Post evaluation of New Zealand's Interloans Best  
Practice Workshop**

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**Abstract**

*The need for well trained and expert interlibrary loan (ILL) staff, and determination of what is Interlibrary Loan best practice have been recurring themes in ILL literature.*

*A national training ILL best practices course was developed by the National Library of Australia as an outcome of the benchmarking study of Australian interlibrary loans and document delivery in late 2000. In July 2004 the National Library of New Zealand (NLNZ) and New Zealand's Joint Standing Committee on Interloan (JSCI) formed a cross-sectoral working party to develop a one day workshop for New Zealand based on the Australian course.*

*The main aims of the New Zealand workshop were to help ILL librarians to learn new, and strengthen existing, professional skills and to raise their awareness of new developments in services and technology. In addition the workshop was designed to assist libraries in improving their performance by following best practice. A*

*comprehensive handbook was developed for participants to take back as a workplace resource. Participant views were sought at the workshop conclusion.*

*A paper showcasing this workshop was presented at the 9<sup>th</sup> Interlending and Document Supply (ILDS) Conference in Estonia.*

*One year on from the workshops participant views were sought again. How did they measure themselves against the interloans best practices outlined in the workshop, then continue that self-assessment in their workplace?*

*This paper reports on how research findings were used to influence best practice, to what degree ILL librarians managed to implement change in areas such as management, staffing, workflows and automation, how useful the handbook was as an ILL resource, and what type of personal, professional and workplace upskilling was achieved.*

*Post evaluation of such a project can offer greater understanding of the long term value of such training and therefore be used to inspire other areas of librarianship to develop other best practice staff training initiatives.*

## **Introduction**

A national staff training initiative, the Interloans Best Practice Workshop, was developed to meet a perceived lack of current, research-based, interloans staff training. Workshops were run in New Zealand regional centres during March to April 2005. The workshop development and evaluation process were presented in a paper at the 9<sup>th</sup> Interlending and Document Supply Conference (Farrelly and Fisher 2005).

One year on the longer term value of the workshop and any influences that impacted on participants' personal, professional and workplace outcomes, have been investigated.

## **Research Question**

Managers need to provide the best interloan service for patrons and other libraries. Often this leaves them looking for training assistance. With the improvements in library automation, greater access to bibliographic sources and suppliers, and increasing patron expectations regarding timeliness and cost of service delivery all interloan staff need ongoing training.

This paper examines the following questions:

- Were the Post Evaluation Survey outcomes consistent with the Interloans Best Practice Workshop aims?
- How successful have participants been in embedding and recognising interloans best practice in their own workplace since the Interloans Best Practice Workshop?
- How well has this national training workshop initiative led to personal, professional and workplace upskilling?

The Post Evaluation Survey<sup>1</sup> was designed to allow for a detailed qualitative reflection on changes in the following interloan areas:

- management;
- staffing;
- workflows;
- automation;
- bibliographic verification;
- statistics; and
- performance measures.

The survey questions sought to test the hypothesis that irrespective of operational size, or interloan staff role, a national research-based training programme is better for skill and knowledge development than a workplace-designed training programme.

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<sup>1</sup> See Appendix 1.

## Background

In New Zealand a national interloan service, available electronically through Te Puna Interloan,<sup>2</sup> is currently used by 236 libraries. A further 112 libraries participate in interloans via email or mail. A national survey of New Zealand interloan services in 2004 provided no analysis of staffing per library, nor did it consider best practice (Cullen, Callaghan and Osborne 2004). In this environment interloan training occurs on the job, at conferences, through reading of professional literature, informal networking and attending professional development courses.

Correspondence with lecturers at the School of Information Management,<sup>3</sup> and the department of Information & Library Studies,<sup>4</sup> indicated their role is perceived as providing a mix of theory and practical application, rather than training in specific interloan procedures. Courses cover such topics as bibliographic utilities and related search skills, automation using digital delivery, electronic journals and books, statistics, and copyright implications. Professional development courses in using the national bibliographic database Te Puna Search<sup>5</sup> and the interloan utility are available from the National Library of New Zealand.

Considerable on the job training in interloan procedures occurs. Continuing education is needed for staff to develop and practise their interloan skills and develop efficient services. Limited continuing education could lead to local perceptions of best practice rather than research-based best practice.

In July 2004 the Joint Standing Committee on Interloan (JSCI) and the National Library of New Zealand formed an eight member cross-sectoral working group to develop a research-based interloans workshop for New Zealand. The working group members were drawn from national, public, special and tertiary libraries throughout the country.

The New Zealand Interloans Best Practice Workshop was based on the findings research, in particular the Australian National Resource Sharing Working Group (NRSWG) Interlibrary Loan and Document Delivery Benchmarking Study of 2000. The Australian study measured four key interloan characteristics: turnaround time, fill rate, unit cost, and patron satisfaction. The study results examined each of these performance measures, including the factors identified as making a high performing library. From these factors five key recommendations<sup>6</sup> were made as to how Australian libraries could improve their interloan operations. The New Zealand workshop drew on and expanded the Australian Best Practices Course developed as a result of the benchmarking study.

The main aims of the workshop were to share and develop interloan best practice for both practitioners and managers. Other aims included learning new professional skills

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<sup>2</sup> Te Puna Interloan is the national interloan utility.

<sup>3</sup> Email correspondence with Alastair Smith, School of Information Management, Victoria University of Wellington, 11 April 2006.

<sup>4</sup> Email correspondence with Alison Fields, Information and Library Studies, Open Polytechnic of New Zealand, 28 April 2006.

<sup>5</sup> Te Puna Search is the national bibliographic search utility.

<sup>6</sup> See Appendix 1, Question 4.

and strengthening existing skills, and raising awareness of developments in services and technology. The workshop was designed to assist libraries in improving their performance by following best practice.

The workshop included modules on international research findings, the interloan life cycle, automation, statistics and performance measures, bibliographic tools and sources, overseas suppliers, bibliographic search skills, and hypothetical library case studies. Each module was based on and linked to research findings. The accompanying comprehensive handbook, designed for use as a workplace resource, covered the same topics. It also contained a bibliography, glossary, and summaries of recent major research.

The length of the workshop was determined by the content. As “enhanced professional and operational knowledge relevant to interlibrary loans”<sup>7</sup> had been identified as one of the learning outcomes, a full day workshop was necessary to include all relevant material. The morning’s programme provided both building blocks for the afternoon modules and an overview for managers not able to complete the full day. The workshop experience was enhanced by providing participants with references and URLs to enable them to engage in preliminary reading on the research basis of the workshop.

Six Interloans Best Practice Workshops were planned, however due to high demand 17 workshops were held. Each workshop had two or three presenters, either members of the working group or a well prepared practitioner. The workshops, held in nine New Zealand centres, attracted 220 participants from 135 libraries. Attendance by library sector was: 41 public, 53 special, 37 tertiary and 4 ‘other’. Those attending were: 16 managers, 27 team leaders, 131 practitioners, 3 ‘others’ and 43 did not designate their role.

Feedback on the workshops was sought anonymously from participants. Key areas of workshop content, presentation, handbook, exercises and the overall workshop all averaged over 4 when rated on a 5 point Likert scale.

The project was deemed to be successful due to the JSCI’s clear mandate to deliver national interloans best practice workshops; the adaptation of the Australian course to a New Zealand context; the production of the valuable handbook; and the sound professional workshop planning approach. Grounded in research, with professional skills identified and practical solutions and resources provided, the workshops did meet a professional need.

### **Literature review**

In preparing to write this paper research related to methods of evaluation, the use of surveys, staff training methods, and embedding of interloans best practice, was explored; in particular:

- the value of using a post evaluation qualitative survey to determine skill; development and changes to work practices;
- the role of staff training in skill development and developing best practice;

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<sup>7</sup> *Interloans Best Practice Handbook*, p1.

- the value of national training initiatives; and
- how to successfully embed best practice in interloan operations.

A key purpose of evaluation is “to gather data useful in problem-solving or decision-making activities” (Lancaster 1988, 1). It is not enough to quantify the interloan outputs, as they “can be and must be evaluated in terms of quality” (Lancaster, 3). So which methods are appropriate to evaluate interloan staff and to “look at functions critically to determine” if interloan is being performed appropriately for patrons and the library organisation (Lancaster, 13)?

Purvis (1999, 59) states that post evaluation is an essential part of project management so that planned versus actual outcomes can be evaluated. It should determine the extent to which the “envisioned benefits of the project were realized” and enable planners to glean valuable lessons to be applied to future projects. Therefore through self-assessment the post evaluation survey could become an important vehicle for gauging learning, and provide support to all levels of interloan staff as they develop their skills.

Qualitative research methods include the use of a questionnaire to derive process commonalities. McDavid & Hawthorn (2006) and deVaus (2002) believe questionnaires such as a post evaluation survey are an appropriate sampling method allowing for maximum variation from a scattered population. Comments supplied will be independent of other respondents, lending authenticity and credibility to potential thematic analysis. McDavid & Hawthorn (2006, 165-200) detail how to apply qualitative evaluation methods so that external validity can be realised through the trends noted in survey responses.

Research on staff development has focused on the development of research-based, or best, practices according to Holcombe (2003, 50). With the advent of interloan automation (NRSWG 2001) staff development has leant towards the use of professional courses in interloan software. However, the integration of that technology as part of a best practice interloan operation has not readily been catered for. Interloan staff have been left to develop their own workflows. What is needed are workshops that provide “thorough updates on specific issues regardless of a practitioner’s geographic location or ability to travel” (Hollerich 2003). Such programmes can be easily developed, disseminated and replicated.

Training methods are best determined by type and amount of information to convey, costs, and benefits to the learner and organisation. Benefits of attending on the job training versus a workshop are discussed by Noe (1999, 166), Race (2001, 123-5) and Leigh (1993, 87-9). An experience staff member with trainer credibility can be used to model best practice knowledge and skills. Trainees are likely to develop job specific skills, need less supervision than before, but lack opportunities for networking. Leigh (1993, 89) is concerned with the greater benefits from attending a workshop, outside the workplace. Different learning styles can be addressed, and high level practical interaction and problem solving can lead to transferable learning. Networking can lead to shared knowledge, skills and viewpoints, plus opportunities for ongoing collaboration. A broader perspective on work practices, from local to national level can occur. Effective transfer of learning can be realised through

learning outcomes embedded in skill building, application of best practice and self-assessment.

The need for continuing education through workshops, conferences, user groups and professional literature (Hollerich 2003; Pryor 1999, 11; Booth 2003, 226; Smith 2004, 148) is noted by managers as a way for interloan staff to maintain current awareness of best practice. With staff isolated operationally, as in New Zealand, the value of regional or national training initiatives is imperative to providing for dedicated and expert trained interloan staff (Leon et al 2003, 422; Hollerich 2003). Hollerich and Smith (2004, 149) believe continuing education must be affordable, regional, and provide topics from overview to in-depth level in order to support and embed change. Holcombe (2003, 53) implores management to find new ways to bring staff and technology together to develop best professional development practices. The networking potential of regional or national user groups can be used to establish mentoring programmes. Hollerich (2003) sees nationally co-ordinated mentoring as a way of providing individualised instruction, consultation services, and linking practitioners by sector, library type and proximity.

Leon et al (2003, 420) describe how the Greater Western Library Alliance (GWLA) defined a framework for consortial interloans best practice based on “highly innovative operating procedures and philosophies that produce outstanding performance when implemented.” Evaluation of embedded interloan work practices was seen to be dynamic and changing as staff sought to continuously adjust interloan operations to changes in technology, user needs and information-seeking behaviours.

Pitman, Trahn and Wilson (2001) reflect on best practice in Australian university libraries in that it must encompass quality frameworks, benchmarking and performance measurement of products, processes and services, and development of staff competencies and related training. This can be applied to an interloan service in that successful embedding involves input, commitment and awareness from management to practitioner.

Carpenter (1998, 66) notes that best practices are qualities that exist along a continuum on which the library places itself. This allows for regular reflection on best practice in terms of identifying characteristics of work processes and behaviours connected to outcomes, and what may need changing.

Interloan staff in small operations rely on details at the structural and procedural levels to help in informing management of viable options in policy, systems and practices. Workshop handbooks, web-based policies and guidelines such as the Interloans Best Practice Workshop Handbook<sup>8</sup>, JSCI Interloans Handbook<sup>9</sup>, IFLA Interlibrary Loan Guidelines<sup>10</sup> and ILLWeb<sup>11</sup> can assist with embedding interloans operational best practice.

## **Research Method**

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<sup>8</sup> [http://www.lianza.org.nz/about/profile/interloan/interloan\\_bpwlinks.html](http://www.lianza.org.nz/about/profile/interloan/interloan_bpwlinks.html)

<sup>9</sup> [http://www.lianza.org.nz/interloans/interloans\\_handbook.shtml](http://www.lianza.org.nz/interloans/interloans_handbook.shtml)

<sup>10</sup> <http://www.ifla.org/VI/2/p3/illdd.htm>

<sup>11</sup> <http://www.law.northwestern.edu/lawlibrary/illweb/>

In February 2006 three members<sup>12</sup> of the Interloans Best Practice Working Group developed a Post Evaluation Survey<sup>13</sup> for participants who had attended the New Zealand Interloans Best Practice Workshops. This survey had been signalled to participants as they completed the workshop.

The survey method was selected due to the spread of potential respondents throughout New Zealand, and the fact that interviews or focus groups were not feasible. Qualitative sampling of all 220 workshop participants allowed for a thematic analysis and maximum variation in documenting and identifying patterns or trends. Open questions were designed to produce a narrative result based on knowledge, skills and workplace outcomes (De Vaus 2002, 118). McDavid & Hawthorn (2006, 22) described this type of survey as leading to two distinctive types of evaluation. Formative evaluation could be used to evaluate a workshop's effectiveness, impact and efficiency. Knowledge evaluation sought to test the 'fit' between research-based interloans key characteristics and the workshop designed on interloans best practice recommendations.

On 6 March 2006 participants were emailed an introductory letter and the Post Evaluation Survey, with a follow-up email to non-respondents two weeks later. Respondents were asked to complete the qualitative survey covering:

- existing interloan best practices;
- changes to interloan services versus areas still to be changed;
- how research findings and recommendations had been used to embed best practice;
- development of interloan skills;
- use of suppliers;
- use of the workshop handbook;
- personal and professional development; and
- awareness of other interloan developments affecting their service.

Participant consent was obtained through survey submission following written assurance that any comments referred to directly in the paper would not lead to personal or institutional identification. Respondents will receive a copy of this paper.

The Post Evaluation Survey sought to determine that the workshop's intended aims had been realised, that best practice had continued or been initiated, and that personal, professional and workplace upskilling had occurred to some degree.

The survey outcomes were affected by the following external variables. These situational constraints included:

- range of interloan roles performed by the respondent;
- varying size of library interloan operations affecting ability to network with other interloan colleagues;
- ability to implement or inform change in the workplace;
- completion of the survey was voluntary, therefore uncertainty exists as to why some participants did not respond;
- qualitative responses being sought; and

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<sup>12</sup> Janice Farrelly, Thelma Fisher and Ted Kurmann, authors of this paper

<sup>13</sup> See Appendix 1

- participants responding on behalf of a library instead of as an individual.

### Respondent Analysis

The survey response rate was 70 (32%) of the original 220 participants covering 135 libraries. Many libraries preferred to give a joint response (57 or 42%) so the respondent return rate was actually higher. Joint replies did affect the ability to accurately analyse results by respondent roles, i.e. manager, team leader or practitioner. Responses came from a wide cross-section of respondent roles (see Figure 1) and library sectors (see Figure 2).

**Figure 1 - Library Type by Respondent role**

	Manager	Team Leader	Practitioner	Team Leader/ Practitioner	Manager/ Team Leader/ Practitioner
<b>Public</b>	2	2	12	3	0
<b>Special</b>	6	2	11	1	2
<b>Tertiary</b>	0	7	16	3	2
<b>Other</b>	0	1	0	0	0
<b>TOTAL</b>	<b>8</b>	<b>12</b>	<b>39</b>	<b>7</b>	<b>4</b>

**Figure 2 – Responses by Library Type**

	No. of Libraries
<b>Public</b>	13
<b>Special</b>	19
<b>Tertiary</b>	23
<b>Other</b>	2
<b>TOTAL</b>	<b>57</b>

Another 12 (5%) respondents declined to complete the survey due to illness, being too busy, no longer in interloan work or because they found the survey too difficult to complete as they were only part of a small interloan operation. Some respondents admitted to questionnaire fatigue, as survey time during March was a very busy time for many interloan staff.

### Research Findings

#### 1. Existing Best Practices

The first question of the survey attempted to establish the level of best practice before the respondents attended the Workshop. Questions focused on practices related to management, staffing, workflow, automation, bibliographic verification, statistics, and performance measures. Over half of the responding libraries indicated that they were achieving levels of best practice as evidenced by the research material covered in the workshops.

The majority of respondents indicated that they were one or two person operations, either in a small special library or in an interloan operation within a larger library. In small libraries, interloans is just one small task undertaken during any working day.

Most respondents believed that they were already trained and expert in all facets of interloans. This included bibliographic verification and document location. Small libraries also indicated that there was a trained and expert staff member available to act as back-up during times of staff shortages or high workload demands.

Respondents indicated that they were aware of the need for the least number of hands to process interloans. They were also aware of the need to streamline processes, and wherever possible use automatic systems to deliver prompt service to customers, either as a supplier or requester. Over half indicated that they were already using Te Puna Interloan to verify and place interloan requests. Many said that they were moving towards patron mediated requesting before the workshop, and others were already delivering documents to the patron's desktop. Two participants mentioned that difficulties with access to and reliability of current technology have hindered their ability to speed up turnaround times.

The survey also indicated that interloan statistics were kept by libraries. These were either basic, comprehensive, or statistics collected as mandated by the JSCI.

Most libraries use turnaround times as the dominant measure of performance in their interloan service. A few respondents mentioned that fill rate and customer satisfaction were used as a measure of performance.

## **2. Implementing Changes**

Respondents were asked to explain changes to their interloan service since the workshop, in terms of management, staffing, workflow, automation, bibliographic verification/locating, statistics and performance measures. Under the management question there were only 7 replies stating that there was no change following the workshop.

Libraries indicated that since the workshop staff were receiving more interloan training. Examples of changes made include:

- the interloan librarian is now the first point of contact for patron requesting;
- training in searching tools and techniques increased;
- more staff are trained in interloan processes; and
- jobs within interloans are now shared and more defined.

Libraries are beginning to use automation as a way to improve workflows, streamline interloan processes, use electronic delivery to patrons, verify citations at the help desk, initiate requests while the patron is present, and reduce paper records. Many are now using their library system to manage monographs borrowed for their patrons. Moves have been towards Te Puna Interloan, electronic delivery (Ariel), automation of record keeping, and encouraging patrons to request via email.

Respondents were appreciative of the wealth of sources that were included in the workshop handbook. Libraries are accessing new databases to increase the accuracy of citation checking e.g. Subito. Libraries also mentioned that the introduction of

Trans-Tasman Interlending<sup>14</sup> and the use of Libraries Australia for verification will have a significant impact on interloans.

Libraries have also streamlined the collection of statistics to those required locally, and for national agencies like JSCI. Interloan staff claim to be more aware of performance measures.

### **3. Areas Difficult to Change**

At the workshops many participants shared that changing parts of their interloan service was going to be a challenge and take time. The answers to this question reinforced the view that there has been little change in the management of interloan departments in the year following the workshop.

There is more emphasis on staff searching, skill training, skill sharing and other processes. Staff members are trained to act as back-up, and other people involved in interloans (administration/copying) have been included in improvement discussions.

Workflows have been gradually changed among responding libraries by interloan staff looking at various issues including:

- delegation of tasks;
- automation;
- performance of mail delivery services;
- written procedures;
- time management and
- less hands.

Changes have been made through joining Te Puna Interloan, implementing Ariel and desktop delivery, and increased training of staff and customers. Libraries are using better tools for bibliographic verification, and have a greater knowledge of sources. The collection of statistics has improved to reflect JSCI requirements.

### **4. Application of Research Findings**

This question investigated how interloans research findings and recommendations had been used to enhance best practices. These recommendations included using the least number of hands, automation, tell the world what you hold, and negotiating reciprocal agreements.

A large number of respondent libraries were single person operations and thus only one person handled interloans anyway. Others expressed a desire to have each interloan request handled by only one person. Some had increased their level of training, including having a trained back-up person.

A number of responding libraries have yet to achieve the desired amount of automated interloan processing, however all expressed an awareness of this.

Others mentioned that they were trying to automate in the following ways:

- working towards electronic document delivery;
- using their Library Management System to manage interloan services;

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<sup>14</sup> See section on Suppliers, p12.

- joining Te Puna Interloan;
- encouraging patron-initiated electronic requesting; and
- electronic delivery.

A large number (56%) responded to the question about telling the world what they hold. Since the workshops, and following initiatives by the National Library, libraries have improved their reporting of holdings by:

- adding branch collections to Te Puna Search;
- retrospective cataloguing of old journal collections;
- making catalogues available freely on the web;
- actively updating holdings; and
- general retrospective cataloguing.

Post workshop, libraries have increased their number of cooperative/reciprocal agreements. Sector arrangements also rated highly.

### **5. Interloan Skill Development**

The majority of responses were from practitioners whose work has allowed them to practise and develop enhanced interloan skills since the workshop. Skills were often described in terms of knowledge and awareness gained during skill acquisition.

During the various stages of the request life cycle development of more skill-based workflows were determined, e.g.:

- design of a request form to cover the complete life cycle stages;
- interviewing the patron to obtain best bibliographic details;
- managing dedicated staff time for interloans versus other office tasks;
- developing rota customisation to improve turnaround time and unit cost;
- de-duplication of record keeping;
- tracking requests; and
- using patron desktop delivery to notify of, and forward, filled copy requests.

Team leaders and managers became more skilled in streamlining workflows, in analysing interloaned titles in order to assess collection development gaps, and monitoring turnaround times. In turn this allowed improved management of supplier choice, reciprocal agreements and rota customisation.

Although many New Zealand libraries have part-time interloan operations, the automation part of the workshop allowed staff different ways to upskill within their budget. Better use has been made of automation with online request forms, temporary local issuing of interloans, and scanners and digital copiers used between branches and patrons.

Bibliographic verification and search skills have increased due to knowledge and use of a wider range of databases and websites, e.g. commercial, European, and those for hard to find materials. The value of the handbook's chapter on Bibliographic Tools/Sources was cited frequently as responsible for this skill development.

The purpose of, and requirement for, interloan statistics has changed with improved automation and reporting compliance at local versus national level. Interloans staff

felt more aware of what to measure and how to collate statistics from varied sources. Most use statistics in defining relevant performance measures, monitoring reciprocal agreements, and reports for analysing collection gaps and usage. Some managers used statistics to show workflow variations during the year allowing for planning of other projects for quieter times, and best use of valuable staff time.

At performance level supplier turnaround time reports were monitored by managers when developing a customised rota. The monthly billing statement was used to assess unit costs. Requester turnaround times were monitored against staff workflows to check for any delays in verifying, requesting, processing, issuing and returning interloans.

## **6. Suppliers**

Respondents were asked how they decided on suppliers and if any changes had occurred. Choice of suppliers is constantly based on evaluating comparative costs, service, quality and speed. Some respondents reassessed how they could achieve best local value. For some it meant customising the New Zealand interloan rota based on turnaround time and high fill rate, whilst others established regional and/or sector reciprocal agreements in order to balance unit costs. Some sought lowest unit cost by sourcing from overseas. The patron satisfaction factor was also addressed by using libraries which could supply direct to the desktop.

From 1 March 2006 the Trans Tasman Interlending scheme has allowed New Zealand libraries to search and request materials from Australia through a shared Te Puna gateway. The effect is yet to be realised but interloan staff are excited about the potential.

Respondents evaluated document suppliers on speed, quality, cost and method of payment. With the 60% price rise on 1 April 2006 Subito has been displaced by some requesters as a preferred copy provider.

For some clinical and scientific patrons the need to use and receive documents in electronic format has led to preferred providers, including suppliers and publishers who offer a 'pay per article' service at a competitive price and instant access. Such use of document suppliers needed to be balanced against staff time in verifying library sources and checking their charges.

Many libraries have joined EPIC (Electronic Publishing in Collaboration), a shared New Zealand libraries' initiative to make available a collection of electronic resources. Respondents indicated this has already begun to reduce the need for interloan copies. Patrons have found instant satisfaction and access to an increased range of suitable titles.

Some special libraries continue to seek access to bundles of fulltext sources, or subject-specific databases, to meet patron research needs, e.g. law, health and science.

E-journal licence subscriptions can be restrictive for interloans and need careful negotiating to ensure maximum patron use, for local or resource sharing. Some

libraries scan from their print versus e-journals so interloan requests can be filled electronically.

## **7. Interloans Best Practice Handbook**

Usefulness of the handbook, in part and/or whole, for interloan staff and other colleagues was investigated. Over 65% of respondents have found the handbook useful in some part, commenting on specific sections through to:

“Verification tools and suppliers lists – these are great.”

“All of it, have re-read several times. The website list is useful.”

“Sorry, can’t choose. It’s all good stuff.”

For practitioners the most frequently used handbook sections were:

- Bibliographic tools/sources;
- New Zealand and overseas supplier tables; and
- Bibliographic search skills.

Reference staff benefited most from cross-training using the sections on bibliographic tools/sources and the search skills. These were an excellent guide and checklist, especially for new staff. The chapter on suppliers was valued by tertiary and public libraries which need to source research and obscure materials. Not all practitioners had used the handbook since the workshop but most claimed to have kept it handy as a reference tool.

For managers and team leaders the most frequently used handbook sections were:

- Research findings;
- Automation;
- Statistics and performance measures;
- Bibliographic tools/sources; and
- Criteria for selecting suppliers.

Practitioners used the resource tables the most whilst managers tended to use the whole handbook as a reference and working tool. For management staff not involved on a daily basis with interloans the handbook and workshop were noted as vital resources to support staff and interloan services.

The handbook was valued as an introductory tool for new staff, especially the life cycle section, and for its overview of interloan operations. For experienced staff it offered details on how to reinforce or introduce new ideas. The print version was referred to the most. Its value as a compendium of tools/sources which have not been compiled elsewhere for New Zealand interloan staff was highlighted. The working party’s dedication in developing sections on automation, statistics and performance measures was noted too as they were timely and relevant to all sectors and roles of interloan staff.

Based on current research the handbook also had significance use in upwards communication with managers when trying to effect change during the last year, especially the part that reinforced the key recommendations for best practice. Whilst some small libraries viewed the handbook as wishful thinking others saw it as giving the bigger picture of the types of resources and workflows that could be employed to positive effect.

## **8. Personal and Professional Development**

Upskilling at a personal and professional level was inherent in the workshop's aims but how was it realised? Respondents often combined personal and professional development in referring to their increased confidence in understanding how to determine what is interloans best practice; something staff were wary of attempting before, especially in smaller interloan operations. Some noted that New Zealand libraries have not had access to such supportive and current, research-based documentation as the Interloans Best Practice Handbook before and have relied on turnaround time statistics, anecdotal patron comments and local interloan user group networking.

At a personal level staff felt more aware of what is currently meant by interloans best practice and felt able to share that with team leaders and managers. They also felt able to contact other suppliers about service issues.

“... have gained a better understanding of a service which is central to my position as Information Advisor and also being able to advise others in the Library.”

“... became especially aware that different types of libraries have different needs in respect of interloans.”

At a professional level staff felt they now had increased skills and competence to perform their jobs better, for their patrons and their libraries, e.g. searching, locating and choosing suppliers, assessing which type of automation fitted their needs and budget.

“I have absorbed some of it to such an extent that it is just second nature...”

At a management level staff reported they had been able to effect change in workflows, keeping of statistics and establishing performance measures for their size of operation, based on current research findings and best practice recommendations.

## **9. Other Interloan Developments**

During the previous year interloan developments had occurred that may have impacted on an interloan service so potential developments from the handbook's Chapter 10, “Where to from here?” were checked against survey responses.

Reciprocal agreements have been initiated by some and extended by others as one way to share resources on a more cost effective basis.

Consortial agreements in purchasing electronic subscription packages, such as EPIC, have increased the level of fulltext access for many public library patrons and decreased the need for interloan copies.

The removal of charges to create a Te Puna Interloan request, together with a push by National Library account managers to increase membership, has meant 30 more libraries have begun using the national interloan module<sup>15</sup> since 1 July 2005. This has considerably reduced the need to email libraries with separate requests, and allowed for consolidated request maintenance.

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<sup>15</sup> Email correspondence from Ankh Spice, National Library of New Zealand, 6 April 2006.

National Library staff have assisted with customisation of the rota and interloan reporting. This has led to savings in staff time when deciding on suppliers. Customised interloan reporting has greatly assisted libraries with collection management and statistical reporting projects.

The JSCI have introduced a new web form for annual report statistic collation so they can monitor New Zealand interloan trends more closely.

A unicode upgrade to the national bibliographic utility, Te Puna, has meant easier access to CJK<sup>16</sup> resources.

Owning the technology to scan, send and receive electronic documents has made interloan services more efficient, led to a decrease in delivery time, and enabled the supply of more articles directly to patron desktops.

Local developments included:

- interloaning theses and their related provisions;
- upgrading Ariel software to v.4.1.1;
- implementing a new ILL policy;
- increasing use of search engines to verify references; and
- centralised print storage has allowed for de-duplication of titles, space and subscription savings, and the establishment of a streamlined catalogue and patron desktop delivery service.

## **10. Other comments**

Networking opportunities at the workshop and beyond highlighted that the New Zealand interloans community is very supportive and that those involved in different sectors and different sized operations share problems and practical resolutions where possible.

“The interloan service is a great resource sharing network in New Zealand and allows better use of limited resources within libraries.”

“...made some good contacts for aspects of work ... and great to know what delivery services others are using and how they find them.”

“It was a good opportunity to meeting other interloan librarians and it helped our understanding of their needs.”

The quality and delivery of the workshop skills and content, in terms of collated wealth of information, were considered very relevant to later workplace implementation. Some respondents felt that such a workshop should be held every two to three years to refresh current staff and attract new staff. As a regional initiative such a project might falter due to lack of numbers so a national project was preferred to serve the national good. It was hoped that outcomes from this post evaluation survey could also be added to the workshop.

Patrons felt they were receiving a better interloan service through workflow changes implemented post workshop. However where part time interloan staff were involved

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<sup>16</sup> Chinese-Japanese-Korean

workflows based on best practice were harder to sustain, largely due to inflexibility of staff rosters.

Library staff involved in interloan operations that focus on supply felt that greater emphasis could have been given to their skills and workflow development.

## **Conclusion**

A post evaluation of this Interloans Best Practice Workshop was used to seek a greater understanding of the longer term value of such training. Did we get the workshop skill and content design right for both managers and practitioners? Was the workshop best positioned at national, local or in-house level?

New Zealand needs more regional, and sector, interloan user groups to avoid staff performing in isolation, without supportive documentation such as the IFLA Interlibrary Loan Guidelines. With no other comprehensive regional or national training, other than training in the interloan utility, the hypothesis of the 'national good' has been proven by default, and also by respondent acclamation. The opportunity to see the interloans 'big picture', ongoing potential networking with colleagues, and the chance to upskill at personal, professional and workplace level, have allowed respondents to continue, or initiate, working towards enhanced best practices. As one respondent wrote:

“The workshop was a valuable (and rare) opportunity to meet face-to-face with fellow Interloan Librarians to discuss and share knowledge, ideas and solutions to Interloans issues. It was also good to have current knowledge and practice both reinforced and challenged.”

Staff claimed to be more confident in their job and performed more competently, even to the point of basing all interloans workplace change on the workshop. The handbook was seen as an ongoing, valuable workplace resource. Without such training support current interloan workplace practices would have continued to be measured against little more than previous outcomes.

According to the majority of respondents the workshop aims had been achieved, depending on the degree of need for, and ability to implement or inform change. Comments about recognising existing best practice suggested that self-assessment was based on the four key characteristics identified by the Australian benchmarking study, and the workshop's skills and content. These allowed for the linking of work practices and behaviours with interloans quality outcomes. Quality was noted in the efficient use of resources to achieve outcomes such as improved turnaround time, increased fill rate, lower unit costs and satisfied patrons. For those trying to effect change at policy, resource and workflow level best practices allowed interloan staff to recognise situations unique to their library and to analyse ways to improve. Greater personal and informed advocacy was possible as interloan staff sought to balance options for improvement or change, e.g. automating interloan stages. Staff also felt a greater awareness of organisational options than before in best use of personnel and resources.

With changing interloan trends the need definitely exists for ongoing policy and procedural training at a regional and national level. Whether it be face-to-face or

web-based it is vital to offer staff the means to recognise and embed interloans best practices in order to meet service goals. The library schools still have a place in presenting an overview of interloan and nurturing interloan as a vital service sector of librarianship. Future challenges will be to continue such supportive and unique national interloan training initiatives, and to survey future interloan staff as to the ongoing needs and value of subsequent interloans training opportunities.

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## Appendix 1

### Interloans Best Practice Workshop – Post Evaluation Survey

**Name:** \_\_\_\_\_

**Library type:** Public – Special – Education – Government – Health – Other

**Role:** Manager - Team Leader - Practitioner

1. When you reflect on your library's processes which aspects confirmed that you were already an interloans best practices library?

Management	
Staffing	
Workflow	
Automation	
Bibliographic verification/locating	
Statistics	
Performance measures	
Other	

2. Since the workshop what has changed in the way your library provides its interloan service?

Management	
Staffing	
Workflow	
Automation	
Bibliographic verification/locating	
Statistics	
Performance measures	
Other	

3. What areas are you trying to change? How?

Management	
Staffing	
Workflow	
Automation	
Bibliographic verification/locating	
Statistics	
Performance measures	
Other	

4. How have you used the ILL research findings and recommendations to enhance best practice?

Least number of hands	
Automation – patron to patron	
Trained and expert staff	
Tell the world what you hold	
Co-operative Agreements	

5. Which interloan skills have you developed since attending the workshop? How?

Workflow	
Automation	
Bibliographic verification/locating	
Statistics	
Performance measures	
Other	

6. Have you made changes in your choice of suppliers? How?

New Zealand libraries	
Overseas libraries	
Document suppliers	
Fulltext databases	

7. Which parts of the Handbook have you found most useful since the workshop?

8. Have you referred other library staff to the print or online handbook?

[http://www.lianza.org.nz/about/profile/interloan/interloan\\_bpwlinks.html](http://www.lianza.org.nz/about/profile/interloan/interloan_bpwlinks.html)

Which sections did you refer staff to?

9. In which ways have you developed in your current position as a result of attending the Workshop?

10. Are there any other ILL developments that have occurred since the workshop that have impacted on your interloans service?

11. Any further comments?