



Creating an Interlibrary Loan Policy for Your Public Library

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Presented by Sara Hayes



Webinar Agenda

- Overview of the Interlibrary Loan Code for the United States and the TexShare Interlibrary Loan Protocol
- Purpose and parts of a local ILL policy
- Examples of policies
- Posting policies



Interlibrary Loan

Interlibrary loan (ILL):

- is intended to complement rather than to substitute for good library collections built and managed to meet the routine needs of local library users.
- is based on a tradition of sharing resources between various types and sizes of libraries and the belief that no library, regardless of its size or budget, is completely self-sufficient.
- may also be used to obtain materials that are owned by the local library but which are not available because they are damaged, missing, or checked out.
- rests on the belief that all libraries have something to contribute and should be willing to lend if they are willing to borrow.

[http://www.ala.org/rusa/sites/ala.org.rusa/files/content/ILL%20Code%20with%20Supplement 11-20-17 updated-link.pdf](http://www.ala.org/rusa/sites/ala.org.rusa/files/content/ILL%20Code%20with%20Supplement%2011-20-17%20updated-link.pdf)



Interlibrary Loan Policies

- Interlibrary Loan Code for the United States
CODE: A system of principles or rules
<http://www.ala.org/rusa/guidelines/interlibrary>
- Interlibrary Loan Protocol for Texas libraries
PROTOCOL: The accepted or established code of procedure or behavior in any group, organization, or situation.
<https://www.tsl.texas.gov/texshare/illprot.html>
- Interlibrary Loan policy at the local level
POLICY: A set of ideas or plans that is used as a basis for making decisions.



Interlibrary Loan Code for the United States

1.0 Definitions

2.0 Purpose

Interlibrary loan (ILL) is intended to complement rather than to substitute for good library collections built and managed to meet the routine needs of local library users.

3.0 Scope

This code is intended to provide guidelines for exchanges between libraries in the United States when no other agreement applies. The code does not override individual or consortial agreements or regional or state codes which may be more liberal or more prescriptive.

4.0 Responsibilities of the Requesting Library

5.0 Responsibilities of the Supplying Library

Supplemental Documentation



Interlibrary Loan Code for the United States

- **4.0 Responsibilities of the Requesting Library**
- **4.1 Written Policies**

A library's interlibrary borrowing policy should be available in a written format and readily accessible to all library users. Whenever possible the borrowing policy should be posted on the library's Web site.



Interlibrary Loan Code for the United States

- **5.0 Responsibilities of the Supplying Library**
- **5.1 Lending Policy**

The lending policy should be clear, detailed, and readily available to requesting libraries. The policy should include among other things, schedule of fees and charges, non-circulating item types, loan periods and renewal policies, current shipping instructions, penalties for late payments, etc.
- The supplying library is encouraged to make its lending policy, contact information, and service schedule available on the library's web site, and in resources such as the OCLC Policies Directory or DOCLINE Institution Information.



TexShare Interlibrary Loan Protocol

This protocol encourages TexShare Libraries to be as generous as possible with each other while maintaining institutional priorities for interlibrary loan service. The goals of resource sharing and cooperation established by TexShare would best be achieved by removing as many barriers as possible from interlibrary loan service.



TexShare Interlibrary Loan Protocol

2.0 General Agreements

3.0 Access to Holdings

4.0 Delivery

5.0 Processing Requests

6.0 Lending Policies and Loan Periods

7.0 Communications

8.0 Costs



TexShare Interlibrary Loan Protocol

8.0. Costs

8.1 TexShare Public Libraries will not charge other TexShare Public Libraries for lending materials or processing fees for lost materials except for the following conditions:

- 8.1.1 Overdue fines
- 8.1.2 Lost Books



TexShare ILL Protocol

8.0. Costs

8.2.1 May charge your own patrons for either the actual cost of postage or a flat rate of **\$3.17**, which is an equivalent of sending a 2 lb package at library rate via USPS.



TexShare ILL Protocol

8.0. Costs

8.3 Lending libraries should notify borrowing libraries promptly when materials are overdue. Invoices for lost materials should normally follow within three months. Invoices for lost books should be paid promptly by borrowing library unless other arrangements are made with the lending library.

8.4 Borrowing libraries will be responsible for the replacement costs of items lost or damaged...Borrowing libraries are responsible for items from the time they are shipped by the lending library until the lending library receives them upon return in accordance with the National Interlibrary Loan Code.



Purpose of a Local ILL Policy

- Staff can provide consistent, confident service
- Patrons empowered to use ILL services with clear expectations
- Other libraries will have clear guidelines on which to base their interactions



Creating a Local ILL Policy

- Policy/Mission Statement : Why does the library provide this service and how does it align with the library's mission statement?
- Regulations: rules that govern the processes for borrowing and lending
- Procedures: Step-by-step instructions for staff and patrons



Mission/Policy Statements

Why does the library provide this service and how does it align with the library's mission statement?

1. Look at your library's mission statement
2. Address how providing access to ILL services helps support the library's mission

Often these statements are very similar from library to library with the goal of meeting the information needs of patrons and the community.



Borrowing Policies

- Patrons that can use ILL
- How to make a request
- Request Limits
- Fees
- Fulfillment time
- Renewal policies
- Methods of notification
- ILL contact information



Lending Policies

- Lending area
- How you accept requests
- Collections that are available to lend
- Loan periods and renewal policies
- Fees for lost or damaged items
- Copy policies
- ILL contact information



Creating an ILL Policy: Elements

- Mission/Goal
- Who is served
- How to request
- Time to fulfill requests
- Fees and methods of payment
- Limitations of Service
- No. of requests allowed
- Formats off limits
- Formats difficult
- Patron responsibilities
- Library responsibilities
- Delivery methods
- Notification methods
- Length of loan, renewal
- Lost material fees
- Contact Information

Weible, Cherie. (2011).
Interlibrary Loan Practices Handbook. Chicago: ALA.



Policy Examples

Tom Green Public Library:

[http://www.tgclibrary.com/ckfinder/userfiles/files/Interlibrary%20Loan%20Policy%20-%20Updated%202018%20\(2\).pdf](http://www.tgclibrary.com/ckfinder/userfiles/files/Interlibrary%20Loan%20Policy%20-%20Updated%202018%20(2).pdf)

Bridgeport:

<https://www.cityofbridgeport.net/99/Interlibrary-Loan-Policies>

Taylor:

<http://www.ci.taylor.tx.us/544/Interlibrary-Loan-Policy>

McAllen:

<http://www.mcallenlibrary.net/services/interlibrary.aspx>

San Antonio:

<https://www.mysapl.org/Services/Account-Access/Interlibrary-Loan>



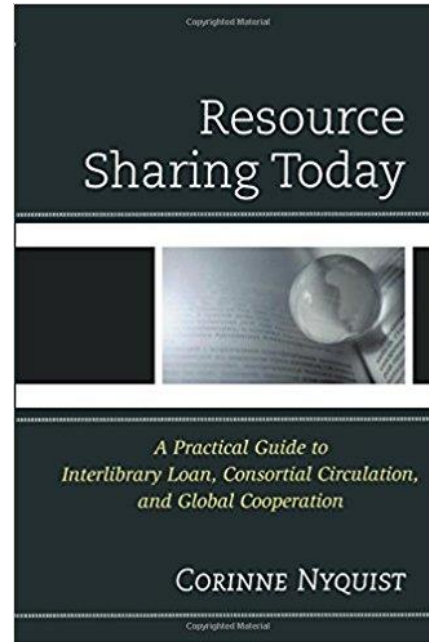
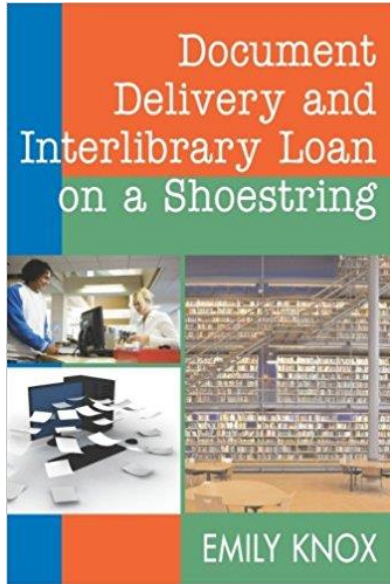
Sample Interlibrary Loan Policy

West Texas Library Group has created an Interlibrary Loan Policy template:

<https://wtlg.ploud.net/consulting/sample-interlibrary-loan-policy.html>

Resources – Books

TSLAC's Library Science Collection



Document Delivery and Interlibrary Loan on a Shoestring by Emily Knox

Resource Sharing Today by Corinne Nyquist

Interlibrary Loan Practices Handbook, Third Ed. by Cherie L Weible & Karen L. Janke

Library Science Collection at TSLAC: <https://www.tsl.texas.gov/ld/lsc>



Posting Interlibrary Loan Policies


- In the library: poster, table tent, pamphlet
- On the website, under “Library Services”
- OCLC Policy Directory

https://help.oclc.org/Librarian_Toolbox/Policies_Directory_guide




OCLC Policy Directory

NRE

- [Search](#)
- [Requests](#)
- [Work Queue](#)
- [User](#)
- [Locations](#)
-  [Reports](#)
- [Batch Reruns](#)
- [Report a Problem](#)
- [Logout](#)
- [Help](#)
- [OCLC Policy Directory](#)
- [Texas Resource Sharing Project](#)

User ID
TEXASSU...

Reports

- Batch Reruns
- Daily ILL Statistics
- Incoming requests by requester
- Loan requested per title
- Loan requested per title - Not Supplied
- Loan supplied per title
- Monthly ILL Statistics
-  OCLC Usage Statistics Web Site Account Details
- Outgoing requests by supplier
- Requesting Patron Emails
- User Barcode Prefix

Start Date  (e.g. 1 Apr 2007)
End Date  (e.g. 10 Jun 2007)

[Generate Report](#) [Reset Query](#)



Create a user manual

Useful Links & information

- [Navigator \(NRE\) log in information](#)
- [Texas Group Catalog](#)
- ILL task expectations
- [Texas Resource Sharing page](#)
- [OCLC training site](#)
- [Statistics page](#)
- Policies and procedures
- [TSLAC website and contact](#)

Quick Reference Guides- Print

[Navigator Quick Reference Guides](#)

[Creating Requests on Behalf of a Patron](#)

[Texas Barcode Prefixes](#)

[Searching for Requests in NRE](#)

[Accessing Statistics through OCLC Usage Statistics](#)

[Accessing Statistics through NRE](#)

[Shipping Items to Borrower](#)

[Receiving an Item from the Lender](#)

[Returning Borrowed Items](#)

[Checking In](#)

[Borrowing Work Queue](#)

[Lender Work Queue](#)

[Search Tips for Texas Group Catalog](#)

[Trouble Shooting](#)



Questions?

Sara Hayes, Statewide ILL Coordinator

email: shayes@tsl.texas.gov

Phone: 512-463-5406

<https://www.tsl.texas.gov/landing/ill.html>