Creating an Interlibrary Loan Policy for Your Public Library

October 9, 2018
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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.

Interlibrary Loan Policies

• Interlibrary Loan Code for the United States
  **CODE**: A system of principles or rules
  [http://www.ala.org/rusa/guidelines/interlibrary](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](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
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.
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
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

Policy Examples

Tom Green Public Library:

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

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

End Date

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?

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