

Interlibrary Loan Policies in Public Libraries

TLA District 3 Fall Meeting
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Texas State Library and Archives Commission



Agenda

- Statewide ILL in Texas
- Purpose of library policies
- National and state ILL policies
- Local ILL policies – elements and examples
- Publicizing policies
- Resources



Glossary

Interlibrary Loan (ILL) – The process by which a library requests material from, or supplies material to, another library.

Navigator – OCLC consortial resource sharing product, access and subscription are funded by the Texas State Library through IMLS for Texas public libraries to manage and complete ILL requests.

NRE – Navigator Request Engine, the web-based staff portal used to manage borrowing and lending requests. Access requires a staff login.

<https://texas.vdxhost.com/nre/>

Texas Group Catalog – Public union catalog staff and patrons use to discover and request materials from Texas libraries and libraries worldwide: <http://texasgroup.worldcat.org/>



Value of Interlibrary Loan

- No library can own every book
- Budgets and shelf space are at a premium
- Hard to find/unique resources
- Collection development policies



Value of Interlibrary Loan

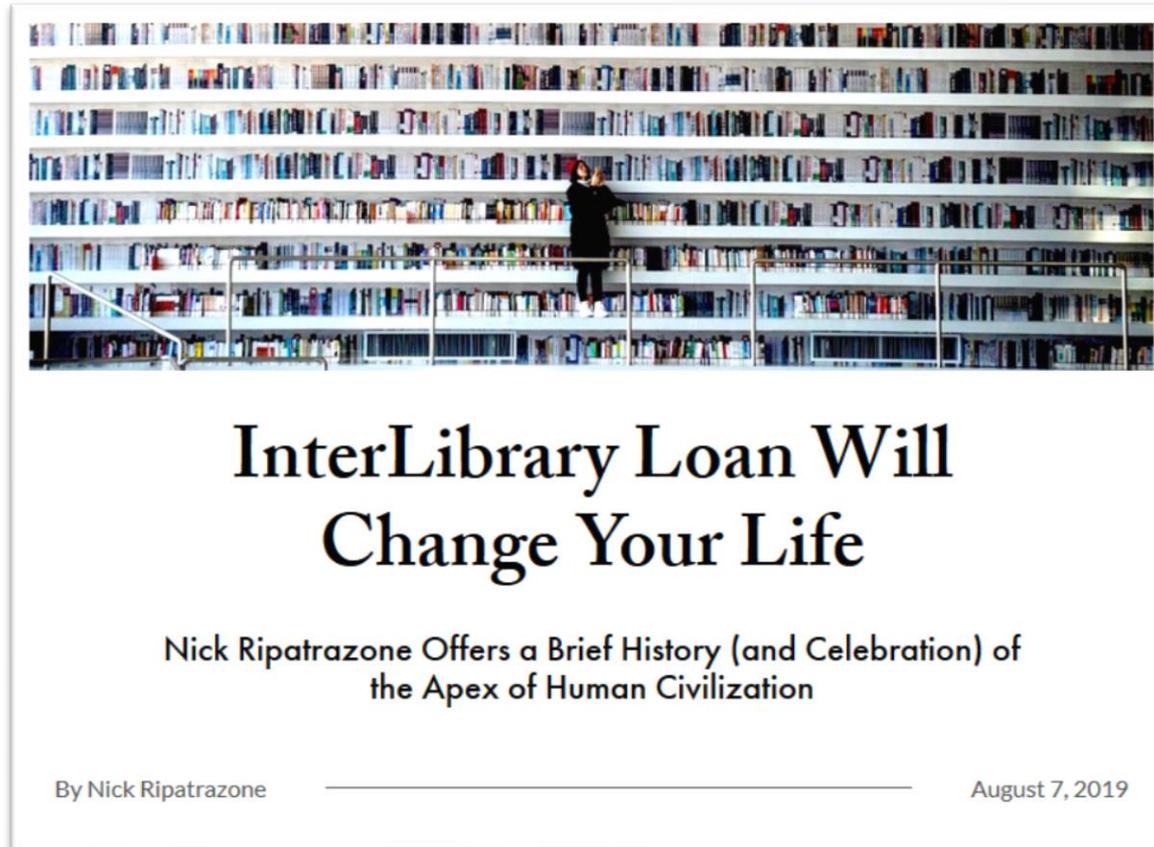
Texas public library accreditation criteria:

Texas Administrative Code, RULE §1.83:

(3) The library must offer to borrow materials via the interlibrary loan resource sharing service for persons residing in the library's designated service area. A library must also participate in the interlibrary loan resource sharing service by lending its materials to other libraries, as requested...



Value of Interlibrary Loan



<https://lithub.com/interlibrary-loan-will-change-your-life/>



Texas Navigator Group

- Texas libraries that use OCLC's Navigator to manage statewide consortial borrowing with the option to use WorldShare ILL for fulfillment elsewhere.
- 556 libraries – 528 public, 14 small academics, 14 detention centers
- FY19 lending: 158,743 items (435 per day)
- FY19 borrowing: 254,055 items (696 per day)



Library Policies

- Library Card
- Patron Conduct
- Circulation
- Interlibrary Loan
- TexShare Card
- Fines & Fees
- Collection Development
- Gifts & Donations
- Customer Service
- Material Challenges
- Computer/Internet Use
- Exhibitor
- Privacy/Confidentiality
- Unattended Child
- Meeting Room
- Food & Drink



Purpose of Library Policies

- Help define the values of the organization, and they help managers and staff translate those values into service priorities.
- Establish a standard for services that can be understood by service users and providers.
- Ensure equitable treatment for all.
- Provide a framework for delivery of services.

<https://libguides.ala.org/librarypolicy>



Interlibrary Loan Policies

- Help **library staff** provide consistent, confident interlibrary loan services.
- Empower **patrons** to use interlibrary loan services with clear expectations.
- Provide clear guidelines on which to base interactions with **other libraries**.



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 states and consortia

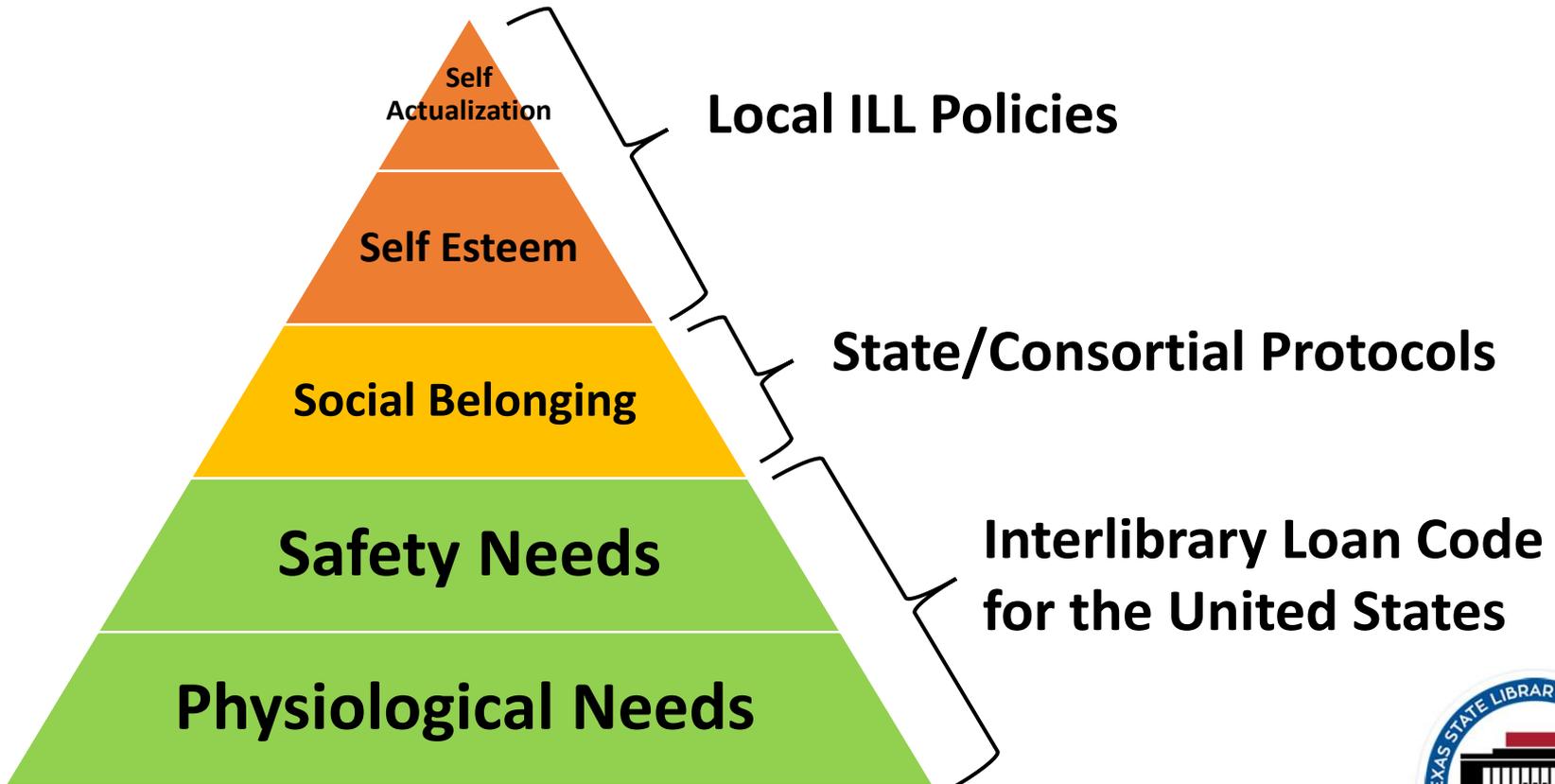
PROTOCOL: The accepted or established code of procedure or behavior in any group, organization, or situation.

- 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 Policies as Maslow's Hierarchy of Needs



Interlibrary Loan Code for the United States

- The sharing of material between libraries is a core library service and believes it to be in the public interest to encourage such an exchange.
- Interlibrary loan (ILL), a mechanism for obtaining material, is essential to the vitality of all libraries.
- The effectiveness of the national interlibrary loan system depends upon participation of libraries of all types and sizes.



Interlibrary Loan Code for the United States

1.0 Definitions

2.0 Purpose

3.0 Scope

4.0 Responsibilities of the Requesting Library

5.0 Responsibilities of the Supplying Library

An Explanatory Supplement available to provide “fuller explanation and specific examples for code text that is intentionally general and prescriptive.”



Interlibrary Loan Code for the United States

4.9 Assume responsibility for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library:

- **A requesting library should never affix adhesive labels or tape directly to any borrowed item.**

4.15 Package material to prevent damage or loss in shipping and comply with any special instructions stated by the supplying library:

- **Staples are strongly discouraged in order to prevent injury to staff and/or damage to materials.**

4.12 Unless otherwise indicated, the due date is defined as the date by which the material is due to be checked in at the requesting library for return to the supplying library.



State/Consortial ILL Protocols

Texas Interlibrary Loan Protocol Scope:

This protocol provides general guidelines for the Texas Navigator Group interlibrary loan activities in Texas with **the understanding that individual libraries and networks will develop and post their own local policies.**

<https://www.tsl.texas.gov/texshare/illprot.html>



Texas ILL Protocol

- **Definitions**
- **Scope**
- **General Agreements**
- **Delivery**
- **Responsibilities of Borrowing Libraries**
- **Responsibilities of Lending Libraries**
- **Communication**
- **Costs**
- **Review and Assessment**



Texas ILL Protocol

General

- Libraries will maintain their catalog holdings in OCLC's WorldCat database by submitting new and deleted material files, annually at a minimum, using [data synchronization](#).

Delivery

- Libraries are encouraged to use the statewide courier, [TExpress](#)/Trans-Amigos Express, for physical items whenever possible. Libraries may also use the United States Postal Service (USPS) for delivery and are encouraged to keep cost documentation.

Costs

- Texas Navigator libraries may charge their own patrons the actual cost of return postage for a request or a flat rate of up to the cost of shipping a 2-pound package with [USPS's library mail rate](#). (\$3.10 as of January 2019)



Local Policy Considerations

- Value of ILL service
- Library's mission
- ILL Stakeholders/Participants
 - ✓ Patron expectations
 - ✓ Library community expectations
 - ✓ Staff expectations



Parts of a local ILL policy

- **Policy Statement:** What is ILL, why does the library provide ILL, and how does the service aligns with the library's mission statement
- **Guidelines:** Rules that govern borrowing and lending processes
- **Procedures:** Step-by-step instructions for staff and patrons

When policies have been adopted by a library's governing agents in a formal process and are consistent with local, state, and federal laws, they will be enforceable.

<https://libguides.ala.org/librarypolicy>



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:**

- To ensure that citizens have access to the information they need to lead informed, productive, and fulfilled lives.

2. **Define ILL services:**

- Interlibrary loan is the process by which a library requests material from, or supplies material to, another library.

3. **Address in your policy statement how providing access to ILL services helps support the library's mission:**

- The Texas State Library provides interlibrary loan services in order to ensure that Texas library patrons, local and distant, have access to information they need which may not be available locally.



Borrowing policies: Patron expectations

- Define patron eligibility
- Provide step-by-step procedures for making a request
- Specify limits on number of requests allowed per patron
- State any associated fees, when they are collected, and payment types accepted
- Give a general fulfillment time expected for requests
- Provide renewal information
- Inform patrons how they will be contacted
- Provide copyright information
- ILL contact information



Lending policies: Library expectations

- State where your library is willing to ship items
- Provide instructions on how your library will receive requests
- Specify which collection are and aren't available to lend
- Give loan periods and renewal policies
- Outline fee and invoicing procedures for lost or damaged items
- State copy and scan policies and delivery methods
- Provide expected turnaround times
- ILL contact information



Local Policy elements

Policy Element	Borrowing	Lending
Mission and Goals	X	X
Who is eligible	X	X
How to make requests	X	X
Expected delivery time	X	X
Fees and methods of payment	X	X
Limitations of service	X	X
Number of requests allowed	X	
Number of lends allowed		X
Formats difficult to fill - will attempt	X	
Formats difficult to fill - will not attempt	X	X
Patron responsibilities	X	
Library responsibilities		X
Delivery methods	X	X
Notification methods	X	
Length of loans, renewals	X	X
Lost or damaged materials procedures	X	X
Contact information	X	X

(Weible, 2011, pg.72)



ILL manual: Staff expectations

General Information

- Navigator (NRE) log in information
- Texas Group Catalog link
- Established local policies
- ILL protocols – U.S. and State
- Generating and using statistics
- State library website and contact information

Training Resources

- Step-by-step procedures
 - Borrowing requests
 - Lending requests
- Training materials and resources
 - Links to TSLAC/OCLC online resources
- Print resources



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ILL policies

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 Public Library:

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

Taylor Public Library:

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

McAllen Public Library:

<https://mcallenlibrary.net/books-more/interlibrary-loan/>

San Antonio Public Library:

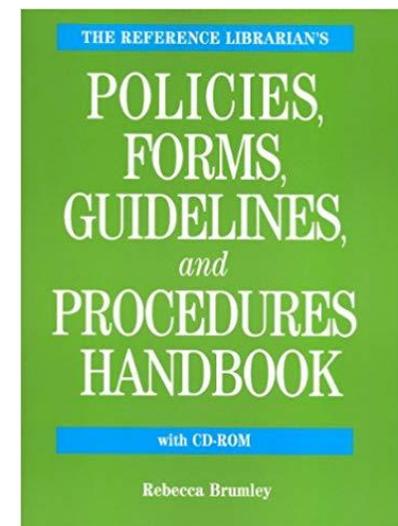
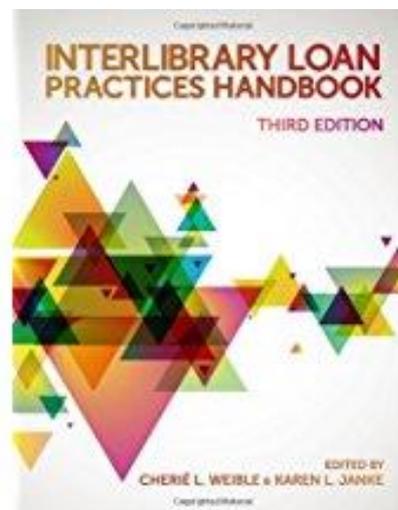
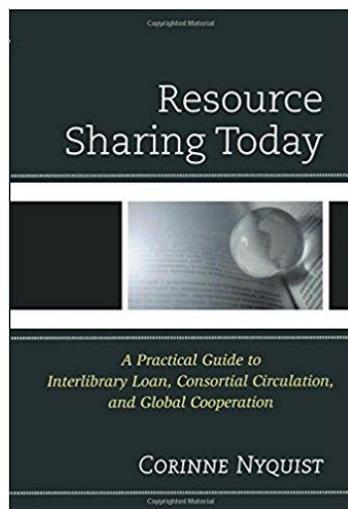
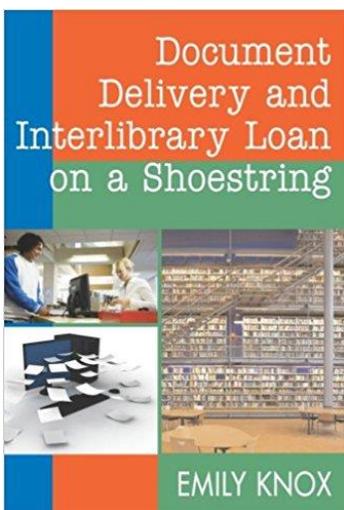
<https://www.mysapl.org/Services/Account-Access/Interlibrary-Loan>

Schertz Public Library:

<https://www.schertz.com/679/Interlibrary-Loan-ILL>



Resources: Books



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



Resources: Online

American Library Association Library Policy Development

<https://libguides.ala.org/librarypolicy>

<http://www.ala.org/rusa/>

TSLAC Small Library Management Library Policies:

<https://www.tsl.texas.gov/ld/workshops/slm/librarypolicies.html>

ShareILL

<http://shareill.org/managing-your-ill-operation/codes-and-guidelines/>

West Texas Library Group policy template

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

State Library Associations

<http://www.ala.org/aboutala/affiliates/chapters/state/stateregional>

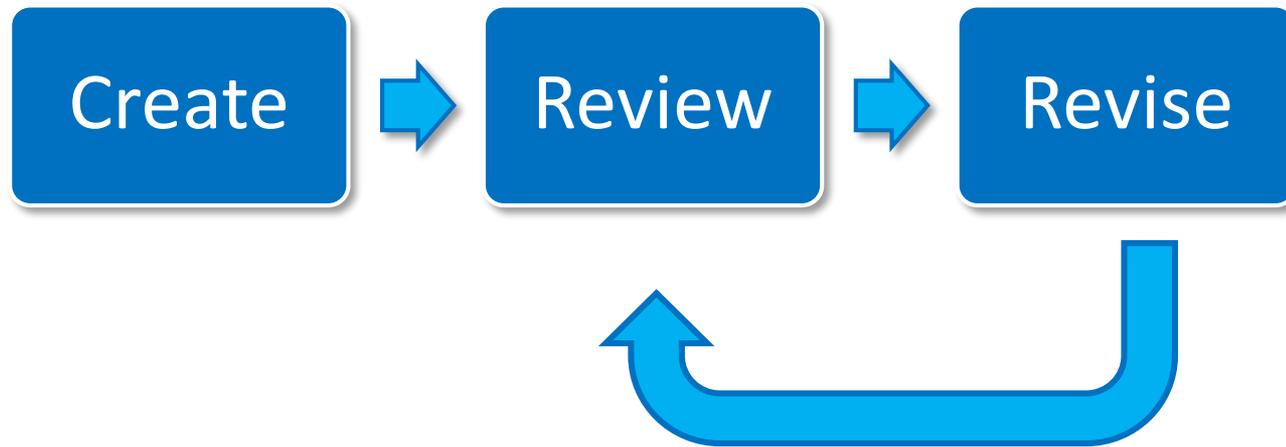


Posting policies

- In your library: posters, table tents, pamphlets
- On your website, under “Library Services”
- OCLC Policy Directory



Policy Lifecycle



Questions?



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



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