BEST PRACTICES FOR ILL LENDING AND BORROWING

Abby Beaver & Robyn Hinds
“In the interest of providing quality service, libraries have an obligation to obtain material to meet the informational needs of users when local resources do not meet those needs. Interlibrary loan (ILL), a mechanism for obtaining material, is essential to the vitality of all libraries.”

“…to obtain, upon request of a library user, material not available in the user’s local library.”

“…tool that can balance unequal distribution of resources in Wyoming.”

RESOURCES

- **Interlibrary Loan Code for the United States**
  - Reference and User Services Association (RUSA)
  - [http://www.ala.org/rusa/guidelines/interlibrary](http://www.ala.org/rusa/guidelines/interlibrary)

- **OCLC Training**
  - Live and recorded webinars
  - [https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Training](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Training)

- **Wyoming State Library**
  - [https://library.wyo.gov/wyld/support/vdx/](https://library.wyo.gov/wyld/support/vdx/)
BORROWING – POLICY

- ILL code 4.12 “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.”
- ILL CircMap Policy (https://wyld.sirsi.net/map/)
- Who is eligible
- What will you borrow (borrowing vs. lending)
- Are there limits
- Charges
BORROWING – POLICY

- How do patrons request materials
  - Enterprise/OPAC
  - Worldcat
  - Library staff only
- Materials available at your library (missing, checked out...)
- Recover if overdue/lost
BORROWING – WHERE’S WALDO

- Worldcat
- GoWyld.net
- Union Catalogs
- Ask friends and neighbors

Other possibilities:
- Records & database citations are subject to error
- Check spelling, transliteration, age, publisher, material type
- Commercial suppliers (Proquest Dissertations)
- Open access, public domain materials
- Bibrecord – 500 and 700 fields
Communication
- Lender restrictions or special requests?
- Complete Citation
- Lender’s shoes

Unfilled requests
- Reasons potential lenders decline
- Check your MARC record (?)
- Resume detective work
Interlibrary Loan Code

- All loans are subject to recall
- All restrictions need to be followed
- Lenders may specify return shipping methods and additional instructions
- Do NOT put adhesive material (tape, labels) on borrowed items
- Item is due back at your library on the due date
- Borrowing library is responsible from start to finish
- Speak with lending library for lost materials
PATRON-DRIVEN ACQUISITIONS

- Heavily requested materials
- Hard to find items
- Work with Acquisitions/Collection Development to create a plan
LENDING - POLICY

Questions to consider
- Who/what/where will you lend
- Charges
- Loan period
- Renewals
- Recalls (or borrow)
- Packaging and shipping
LENDING - COMMUNICATION

- Worldshare ILL account is up to date & accurate
- Contact information findable
- Check often

Internal communication
- Collection managers, special collections, circulation, etc.
- Non-circulation items
  - Exceptions
  - How many times has it circulated in the past
  - Is it replaceable
  - ILL lending lost/damaged statistics

- If you can’t fill
  - Give borrowing library reason why
  - Report errors to cataloging or electronic resource manager
LENDING – COMMUNICATION CONT.

- Max cost
- Date needed by
- Requested delivery method
- Special instructions
- Copyright for non-returnables
- Licensed to fill from electronic resources
Don’t…
- Deal directly with another library’s patron
- Update to “shipped” unless the article is already mailed/scanned/copied/sent
- Conditionalize a request when the only possible answer is No
- Hold on to a request to check shelves again when you are early in the string
- Staple packing envelopes shut
- Fill a request if your charge exceeds the borrower’s max cost
- Invoice a library more than six months after the request
Do…

- Respond to requests promptly
- Include a cover sheet that includes at least the ILL number and title of the request
- Pay attention to special requests
- Consider making exceptions when possible – why is that item non-circulating?
- Respond to renewal requests in a timely manner, even if your answer is no
- Respond to “not received” messages in a timely manner
- Suspend services when closed or on vacation
- Be generous
Guidelines for Interlibrary Loan Operations Management -
http://www.ala.org/rusa/sites/ala.org.rusa/files/content/stars-guidelines-for-ILL.pdf

Guidelines for Resource Sharing Response to Natural and Man-Made Disasters -

IFLA Guidelines for Best Practice in Interlibrary Loan and Document Deliver -
Questions?

Robyn Hinds
Interlibrary Loan Technician
robyn.hinds@wyo.gov
307-777-7282

Abby Beaver
Information Services Manager
abby.beaver@wyo.gov
307-777-5913