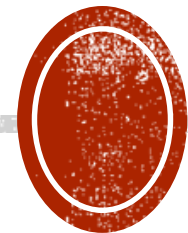


# **INTERLIBRARY LOAN POLICIES IN PUBLIC LIBRARIES**

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Texas State Library and Archives Commission (TSLAC)

Colorado ILL Conference - April 26, 2019



# REPUBLIC OF TEXAS, 1836



# AGENDA

- Purpose of library policies
- National and state ILL policies
- Local ILL policies – elements and examples
- Resources for policy creation
- Posting policies



# TEXAS NAVIGATOR GROUP

- 556 libraries – 528 public, 14 small academics, 14 detention centers
- Use OCLC's Navigator to manage statewide consortial borrowing with the option to use WorldShare ILL for fulfillment elsewhere.

Navigator Request Engine (NRE): Staff portal

Texas Group Catalog: Discovery

ILL: some have interoperability with Navigator

- FY18 lends: 156,864 items
- FY18 borrows: 247,165 items



# TEXAS NAVIGATOR GROUP

## **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...



# CASE STUDY #1

A person, who does not currently have a library card with us, is requesting an inter-library loan of a DVD, which will be coming from Kansas. I feel uncomfortable doing this for someone just getting a card with us for the first time.

We're a small library (20 hours weekly) and don't have a waiting time to get a card because I generally know most people who come in for one. I don't know this person.

She said she can get it through the Waco library (may have been there when she called), but it will have to wait a month (guess part of their clearing process).

Any thoughts from the state level for me to pass along to her?

## CASE STUDY #2

I have a patron who has never failed to return books with spills and food. I can generally clean them up okay, but they often look like they were used as a plate.

I have permanently banned her interlibrary loan privileges. She seems to feel this is unreasonable as no library has ever ended up charging us for the damages. She says since she's willing to pay for any damaged books, it should be okay.

Does anyone else have a policy that works well in these cases? I can't use 'library use only.' She just takes the books with her and we don't have the staff to stand over her.

I'd like to work with the patron, but I honestly don't have any ideas. Unfortunately, I can't recommend she use her home town library's service as she's out of favor there, as well.

# CASE STUDY #3

A patron called the state library saying his local library had revoked his interlibrary loan privileges after an AV item was returned with a damaged case. He had returned the item in the AV book drop with no damages and didn't hear anything from the library about a damaged item or fee to cover the damage. Weeks later he tried to use ILL and discovered he could not use the service.

I contacted the library for more information and they had notified the patron about the damaged case and given him the opportunity to pay the \$4 and continue using ILL services, but he refused. A staff member told him his ILL privileges were revoked and nothing could change that. The director told me she wished the staff member would have handled the situation differently, but that the patron had had the opportunity to pay and declined.



# CODES, PROTOCOLS & POLICIES

## OH, MY!

- Library Use Policies
- Circulation Policies
- Display & Exhibits Policies
- Materials Selection Policies
- Materials Reconsideration Policies
- Meeting Room Policies
- Confidentiality & Privacy Policies
- Gift & Donation Policies
- Internet & Public Computer Policies
- Volunteer Policies
- ILL Policies
- Unattended Children Policies



# 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 users** of the service and providers.
- Ensure **equitable treatment** for all.
- Provide a framework for **delivery of services**.

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



# INTERLIBRARY LOAN POLICIES

- **Help staff** provide consistent, confident interlibrary loan service.
- **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 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**

## **Explanatory Supplement**



# 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.

- **5.0 Responsibilities of the Supplying Library**

- 5.1 Lending Policy**

- The lending policy should be clear, detailed, and readily available to requesting libraries.



# 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:

- In particular, 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.



# STATEWIDE & CONSORTIAL PROTOCOLS

## Colorado Interlibrary Loan Best Practices:

In conjunction with the Interlibrary Loan Code for the United States, the Best Practices assists Colorado libraries in providing that service within a framework of mutual understanding and good faith.

## 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.





# TEXAS INTERLIBRARY LOAN PROTOCOL

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



# TEXAS INTERLIBRARY LOAN PROTOCOL

- **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 : Why the library provides ILL and how the service aligns with the library's mission statement
- Regulations: 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.
2. Define ILL services.
3. Address in your policy statement 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: 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

Element	Borrowing	Lending
Mission/Goal	X	X
Who is served	X	X
How requests can be made	X	X
Typical time for fulfillment	X	X
Fees and methods of payment accepted	X	X
Limitations of service	X	X
Number of requests allowed per person	X	
Number of pieces loaned at one time		X
Formats difficult to fill – will not attempt fill	X	X
Formats difficult to fill – will attempt to fill	X	
Patron responsibilities	X	
Library responsibilities		X
Delivery methods	X	X
Notification methods	X	
Length of loan, renewals	X	X
Lost material fees/procedures	X	X
Contact information	X	X

(Weible, 2011, pg.72)





# ILL MANUAL: STAFF EXPECTATIONS

- Established local policies and step-by-step procedures
- ILL protocols – U.S. and State
- Navigator (NRE) log in information
- Texas Group Catalog link
- Training materials and resources
- Generating and using statistics
- Instructions on updating holdings
- State library website and contact information
- [Navigator Glossary](#)
- [Navigator Quick Reference: Shipping](#)
- [Navigator Quick Reference: Receiving](#)
- [Navigator Quick Reference: Returning](#)
- [Navigator Quick Reference: Checking In](#)
- [Navigator Quick Reference: The Borrower Work Queue](#)
- [Navigator Quick Reference: The Lender Work Queue](#)
- [Navigator Quick Reference: Creating Requests on Behalf of a Patron](#)
- [Navigator Troubleshooting Guide](#)



# EXAMPLES OF 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:**

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

## **San Antonio Public Library:**

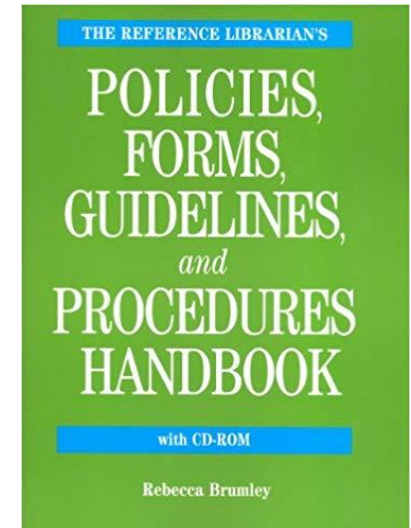
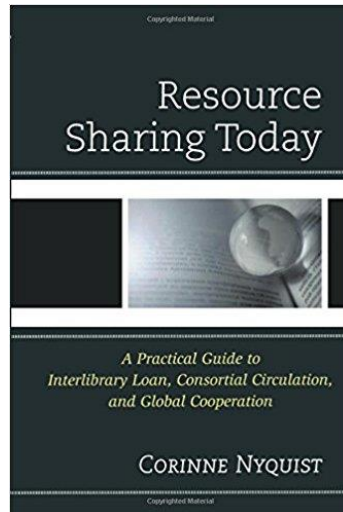
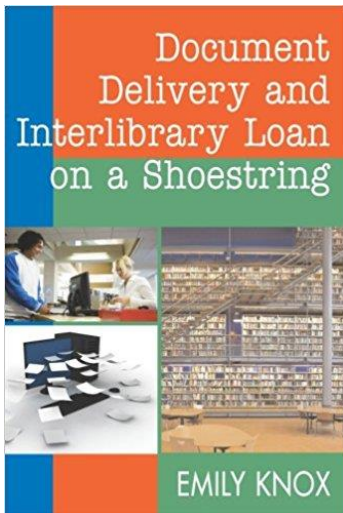
<https://www.mysapl.org/Services/Account-Access/Interlibrary-Loan>

## **Schertz Public Library:**

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



# RESOURCES: BOOKS



# 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



**FINALLY...**



# QUESTIONS?

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**THANKS, Y'ALL!**

