LENDING
RUSA-STARS
Midwinter Workshop
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Philadelphia, PA


STEP 1: LENDING POLICY

- What are you going to lend?
- For how long? Is 30 days enough? What would you want if you were the patron?
- For how much?
- How are you going to deliver it?
- Do you need a computerized system to manage it?
- How do you check out materials in your ILS?
- How many people do you need/can you afford in order to accomplish this?
GETTING IN TOUCH

- Policies Directory / Website
  - Policies Directory
    (try searching “YOM”)
  - Lender Website Examples

- E-mail address & Phone
  - In your constant data?
  - Generic account that many can check?
  - Account checked at least once a day?
  - Separate accounts for Article Exchange (please no!)
  - Article Exchange emails being rejected because of shortened URL?
IMPORTANT COMMUNICATIONS

- Borrowers: How overdue is it?
- Borrowers: Don’t ask the lending library to play the heavy – issuing invoices costs them money!
- Borrowers: Complaints about fees for borrowing? Please don’t give out lending library’s name/phone number.
- Borrowers: Communicate to your patrons how to return and renew.
- Lenders: Making deals/special arrangements directly with patrons of other libraries?
BORROWERS:
TO RUSH OR NOT TO RUSH...

- **Document Supplier** / **British Library**
- Ask your friends first...or someone who owes you already.
- Check lending library website or policies directory
- Try calling or emailing lender first!
- Don’t bombard lenders with a fax of an existing request.
Borrower: send a thank you, and cc: their boss!
Borrower: offer to pay overnight FedEx or UPS with your account number
Lender: remember and seek them out when you need a favor
Just Say “No” to Conditionals such as...

- “Sorry, non circulating!”
- “Sorry, we lack this year”
- “We only have vol 1 of this 2 vol set, do you still want it?” (and are 1st in the string)

If you can’t find the book on the shelf and you are the first lender in the string, SAY NO.
- But it pays to make nice with them!
- Can exceptions be made?
- How many items have been lost/damaged?
- How many times has it circulated in the past?
- Could it be replaced easily?
IF WHAT YOU’RE BEING ASKED TO LEND/BORROW IS NON-CIRC, WHY?

- Rare?
- Expensive/Inexpensive?
- In Demand?
- Can you buy it?
- Don’t take it personally
Look for THIS EDITION ONLY statements in request
Check the requested item versus what’s pulled from the stacks.
Especially for classic literature or when there are numerous editions.
Especially if students are pulling requests
Answer: Borrowing Library!

Google is the BFF of ILL!

Series statements? Proceedings as monograph or serials? Reprints? Freely accessible websites or e-journals?

Serials with title changes (fields 780 & 785)

Ask for help on the ILL Listserv, but give ALL the info
“Our IFM report from 2 years ago shows a discrepancy and we’re now charging you $10 via an invoice.”

Mistakes happen, but check your IFM reports promptly.

If the financial error is > 6-12 months or from a different fiscal year, or can’t be solved through a dummy request, forget it!

Lenders: Don’t fill the request when the maxcost is lower than your fee! Borrowers aren’t obliged to pay.
Lenders: Do they really want the abstract?

Borrowers: Do your patrons know what they are requesting?

Borrowers: Google Scholar for digital repositories

ILLiad Users: create a routing rule for dissertations, include article requests from this publication
BUSY IS RELATIVE

- Large volume lenders: 700+ transactions PER DAY
- Small Libraries: part-time staff, may not have the expertise
- Look at your Stats to see which lenders perform the best (or how you are performing as a lender)
ELECTRONIC DELIVERY ON THE CHEAP

- Fax Machines: Just Say No!
- Odyssey Standalone
  - Send and/or Receive
    - [https://osu.illiad.oclc.org/illiad/osu/lending/odysseyfaq.html](https://osu.illiad.oclc.org/illiad/osu/lending/odysseyfaq.html)
  - Can receive as a borrower without scanning as a lender.
- Email PDFs or OCLC Article Exchange
- Ariel/Odyssey transmissions that don’t go through?
Hiring

- Hire people who have worked in food service and were good at it!
- Can you type?
- Be honest about the nature of the work when you hire.
Is anyone going to die?

Borrowers: don’t be upset if your request is turned down.

Most people try to do the right thing most of the time.

ILL Karma & The Golden Rule
YOUR ILL NEW YEAR’S RESOLUTIONS

1. Visit your library’s entries on the OCLC Policies Directory & WorldCat Registry
2. Review your policies for your patrons and other libraries
3. Review your custom holdings groups (or set some up)
4. Set up a deflection of something that you always say no to
5. Look at your stats
   (OCLC stats: http://www.stats.oclc.org)
   1. IFM Reports (Monthly!)
   2. Reasons for No
   3. Lenders/Borrowers who are particularly good/bad