

LENDING

RUSA-STARS

Midwinter Workshop

January 24, 2014

Philadelphia, PA

Karen Janke

**Library
Director**

**Erikson
Institute**

Chicago, IL

BUT THEY DIDN'T TEACH ME THIS IN LIBRARY SCHOOL....

- ❖ Weible, C. L., & Janke, K. L. (Eds.). (2011). *Interlibrary Loan Practices Handbook (3rd ed.)*. Chicago, IL: American Library Association.
- ❖ **Best Practices in Medical Interlibrary Loan and Electronic Document Delivery.** Special issue of *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve*, Vol. 17(3) 2007
- ❖ 2006. **Interlibrary Loan and Document Delivery: Best Practices for Operating and Managing Interlibrary Loan Services in all Libraries.** Special issue of *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve* 16(1/2).
- ❖ Leon, Lars E., et al. 2003. **Enhanced Resource Sharing Through Group Interlibrary Loan Best Practices: A Conceptual, Structural, and Procedural Approach.** *portal: Libraries and the Academy* 3(3), 419-40.
- ❖ Shrauger, K., Radnor, M., & Santiago, A. 2012. **Fourteen Things to Look for When Hiring New Staff in Interlibrary Loan/Document Delivery.** *Journal Of Interlibrary Loan, Document Delivery & Electronic Reserves*, 22(5), 269-275.

BUT THEY DIDN'T TEACH ME THIS IN LIBRARY SCHOOL....

- ❖ Kochan, C., & Leon, L. (2013). **Revisiting interlibrary loan best practices: still viable?**. *Interlending & Document Supply*, 41(4), 113-119.
- ❖ Ezell, Samuel Jason. 2013. **Interlibrary Loan From a Distance Learning Perspective: Trying a Hybrid Position.***Journal Of Interlibrary Loan, Document Delivery & Electronic Reserves* 23(3), 165-174.
- ❖ Zheng Ye, Y. (2009). **The Ten Commandments of Interlibrary Loan Borrowing, Interlibrary Loan Lending, and Shipping and General Conduct.** *Journal Of Interlibrary Loan, Document Delivery & Electronic Reserves*, 19(1), 95-100.

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.

YOU SCRATCH MY BACK....

- **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

KEEP IT MOVING RIGHT ALONG...

- 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.



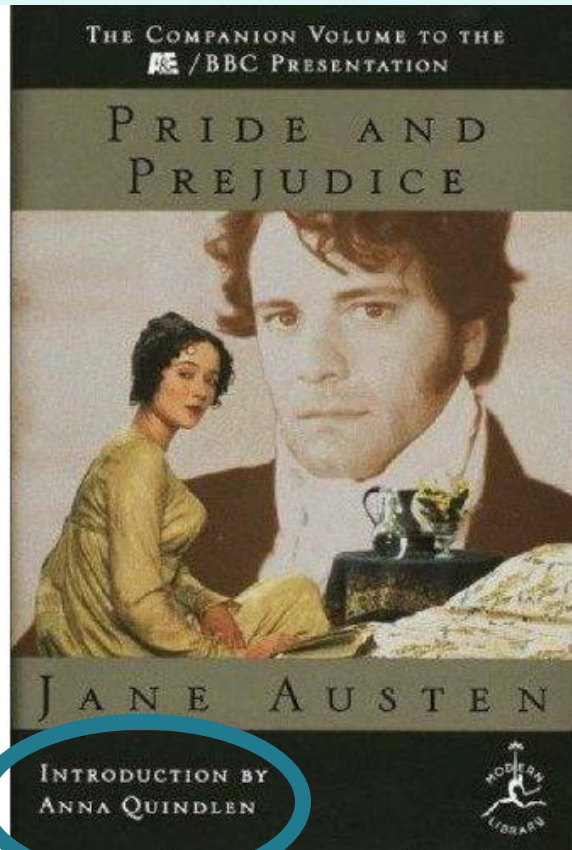
ILL DEPARTMENTS ARE NOT (NECESSARILY) COLLECTION MANAGERS!

- **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

SPECIAL EDITION!



- 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

CITATION VERIFICATION: WHOSE JOB IS IT?

- **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.

DISSERTATION ABSTRACTS INTERNATIONAL

- **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>
 - <http://www.atlas-sys.com/products/odyssey/>
 - 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.

LIGHTEN UP!

- 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