OCLC

RSC22

WEB SERIES

oc.lc/rsc22

Register at oc.lc/rsc22

Date/Time	Title	Presenter(s)
Wed, April 6, 11:00 am EDT	Controlled digital lending for resource sharing: Law and policy since 2018	Kyle K. Courtney, Dave Hansen
Thurs, May 5, 12:00 pm EDT	Working smarter not harder: How to automate your holdings and configure policies to expedite fulfillment	Scott Brandwein, Helen Pinder
Tues, May 10, 1:00 pm EDT	Lightning sessions • Resource sharing at the Internet Archive • E-book lending	 • Brewster Kahle • Krista Higham
Wed, May 25, 2:00 pm EDT	The persistence of CONTU: The results of two surveys	Cindy Kristof, Meg Atwater-Singer
Tues, June 14, 11:00 am EDT	An update on your ILL services, and a look to the future	Peter Collins, Stephanie Spires
Tues, June 21, 1:00 pm EDT	Controlled digital lending during global COVID-19 and beyond	Xuan Lily Pang, Peggy Glatthaar, Alvin Lee

Register at idsproject.org/OLI/index.aspx

Online Learning Institute

IDS PROJECT

Online Learning Institute

IDS Project developed the Online Learning Institute in January 2014 in an effort to meet the needs of our members as well as provide nationwide support for resource sharing training and discussion. A growing number of courses include instructional videos, resource materials, discussion opportunities, and web conferences to enhance access to professionals in the field of resource sharing. Successful completion of courses supply students Accomplishment Certificates as well as a network of colleagues to encourage discussion, troubleshooting and innovation throughout the field of resource sharing.

OCLC Resource Sharing Conference: ILL 101 2022

- Copyright 101 - Mar 21, 2022 02:00 PM Eastern Time - Cindy Kristof - Kent State - Registration
- Borrowing 101 - Mar 21, 2022 03:00 PM Eastern Time - Megan Gaffney - University of Delaware - Registration
- Lending 101 - Mar 22, 2022 02:00 PM Eastern Time - Silvia Cho - CUNY Graduate Center - Registration
- Assessment 101 - Mar 22, 2022 03:00 PM Eastern Time - Emily Aylward - Conn College - Registration

LENDING 101

Prepared by: J. Silvia Cho
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The Graduate Center, CUNY
IDS Project/Online Learning Institute

OCLC

Today's plan

- New to ILL Lending, or wanting to think about your current ILL Lending.
- Path:
  - Why lend > some principles > and a few more things…
  - Policies
  - Setting yourself up
  - Workflows & Training
  - Assessment/Feedback Loop
  - What's next?
  - Resources

Why Lend?

- No collection is self-sufficient
- Ever-increasing quantity and diversity of publications
- With interlibrary loan, we get materials to users who need them, *where* they need them, and, (hopefully), *when* they need them, and (also hopefully) in the format that they need.
- But: we can borrow only because others lend (and vice versa).
- Contribute to greater equity

Some Principles

- Lend as broadly and conveniently as possible.
- Communicate your policies clearly.
- Be as prompt as possible
- Respect user privacy

Key Document: *Interlibrary Loan Code for the United States and Explanatory Supplement: Responsibilities of the Supplying Library*

And a few more more things:

- You are not alone: get to know other libraries, visit (virtually or in person) if possible, get to know colleagues, ask.

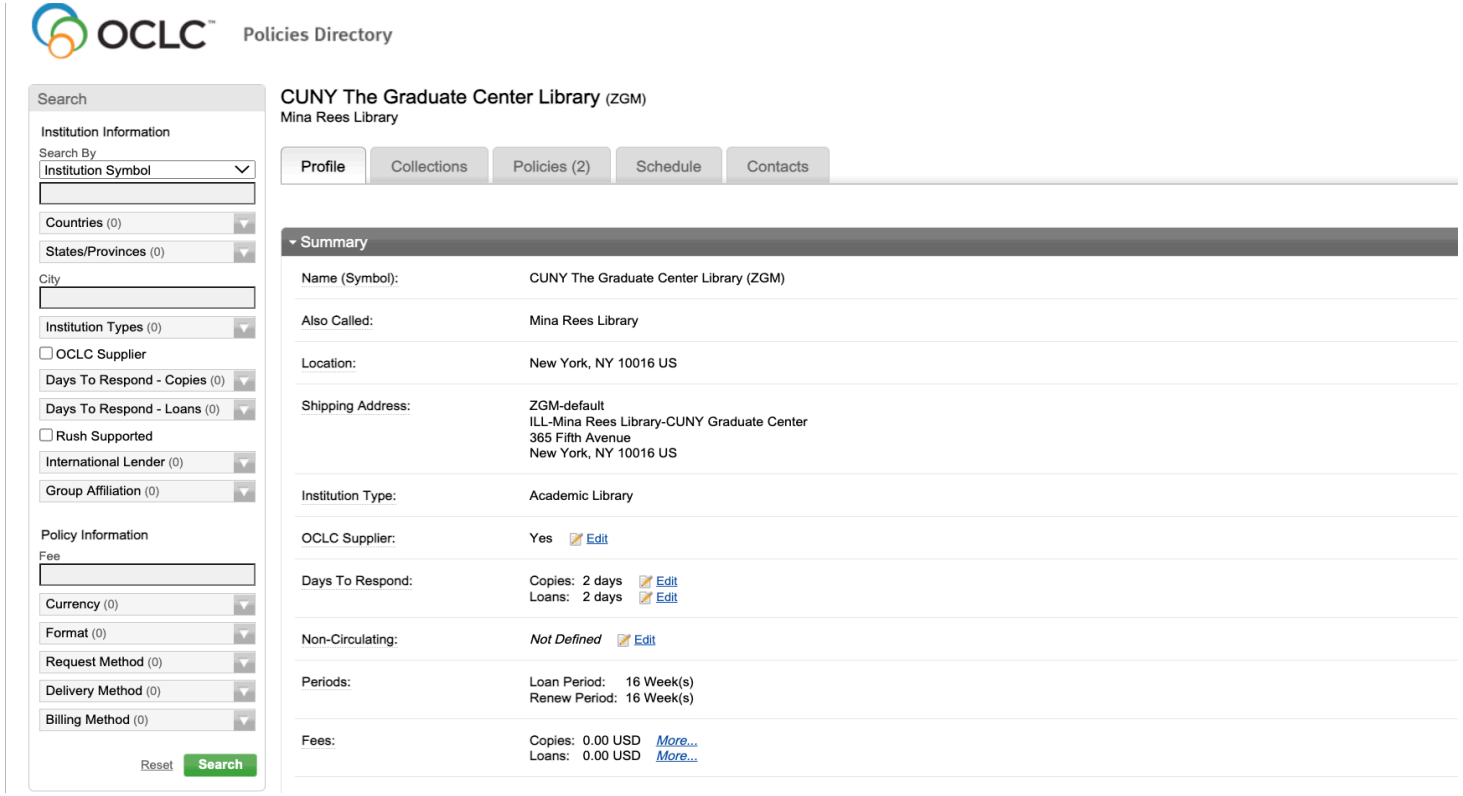
- To be a good lender (and borrower), you need resources and adequate support (staff time, technology, supplies, mailing ability, budget…). Be an advocate with your administration.

Policies

- What can you lend?
- How fast will you be able to respond?
- What will be your loan period?
- Can you renew? For how long?
- Will you need to charge? How much?
- Can you join consortia/reciprocal agreements?
- Will you recall? When?

Policies

- What are your existing policies?



- OCLC's ***Interlibrary Loan Policies Directory***: https://illpolicies.oclc.org/ (also can get there from Worldshare ILL, ILLiad, Tipasa, FirstSearch).
  - Update your contact & mailing info
  - Check/source for your URLs, Odyssey address, etc.
  - Check each tab for stated policies:
    - What do you lend? To whom? Do you charge? What methods of payment do you accept? How fast is your promised turnaround? How long do you lend for? Do you belong to consortia? Which?

- As you review, *ask yourself*—does this still make sense? Should it be maintained or explored further for a possible change?

OCLC Policies Directory

Search

Institution Information

Search By

Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Days To Respond - Copies (0)

Days To Respond - Loans (0)

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Fee

Currency (0)

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

CUNY The Graduate Center Library (ZGM)

Mina Rees Library

Profile | Collections | Policies (2) | Schedule | Contacts

Summary

Name (Symbol):	CUNY The Graduate Center Library (ZGM)
Also Called:	Mina Rees Library
Location:	New York, NY 10016 US
Shipping Address:	ZGM-default ILL-Mina Rees Library-CUNY Graduate Center 365 Fifth Avenue New York, NY 10016 US
Institution Type:	Academic Library
OCLC Supplier:	Yes Edit
Days To Respond:	Copies: 2 days Edit Loans: 2 days Edit
Non-Circulating:	*Not Defined* Edit
Periods:	Loan Period: 16 Week(s) Renew Period: 16 Week(s)
Fees:	Copies: 0.00 USD More... Loans: 0.00 USD More...

Fees:	Copies: 0.00 USD *More...* Loans: 0.00 USD *More...*
Request Methods:	Copies: ALA, Email, Fax, Mail, OCLC ILL Loans: ALA, Email, ISO ILL, Mail, OCLC ILL
Delivery Methods:	Copies: Odyssey
Group Affiliations:	CENTER FOR RES LIBR GROUP/LINDA HALL LI , CITY UNIV OF NEW YORK ULS , GIF-N AM COORD COUN ON JAPANESE LIBR RES , IDS PROJECT , LIBRARIES SUPPLYING ELECTRONIC DOCS DUR , LIBRARIES VERY INTERESTED IN SHARING , LIBRARIES WITH LOAN PERIODS OF 12 WEEKS , LVIS LIBRS WITH LOAN PERIODS OF 12 WEEKS , METRO REG GAC , NEW YORK CITY REG ULS , NEW YORK CONSOLIDATED ULS , NEW YORK STATEWIDE GAC , NORTHEAST GAC , NY3RS ASN INC , NYLINK INTERLIBRARY CODE GROUP , OCLC PILOT , OCLC TRAINING & ILLIAD PARTICIPANT , SHARES PROG GROUP , US NEWSP PROG
International Lender:	Copies: Any Country Loans: Any Country

Details

Article Exchange:	*Not Defined*
Odyssey Address:	206.107.43.174
Library Catalog URL:	http://libsearch.cuny.edu.ezproxy.gc.cuny.edu/F/ *More...*
Library Homepage URL:	http://library.gc.cuny.edu/
Lending URL:	*Not Defined*
FEIN:	*Not Defined*

Note:

Loans

Add

CUNY Graduate Center - Mina Rees Library (ZGM-default)

Edit Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None **Loan Period:** 16 Week(s) **Renewal Max:** None **Renewal Period:** 16 Week(s)	**Per Request:** • No Charge **Currency:** United States Dollar **Tax Included:** No	**Groups:** Any **Libraries:** Any **Locations:** Any	**Collections:** Any **Formats:** Archival/Mixed Material Book Dissertation E-Text Government Document Internet Resource Manuscript Map Microform Musical Score Newspaper Other Proceedings Serial Serial - Bound Serial - Unbound Sound Recording Sound Recording - Cassette Sound Recording - CD Sound Recording - LP Thesis Visual Material Visual Material - DVD Visual Material - VHS	**Requests:** 1. OCLC ILL 2. ALA 3. Mail 4. ISO ILL 5. Email **Billing:** 1. OCLC IFM

Note:

- Other sources for understanding your policies:
  - Review public & internal communication:
  - Your (and your library's) public web pages, FAQs, stated policies.
  - Internal documentation, manuals, task lists, etc.

- Other sources for understanding other key data (e.g. volume, turnaround time, fees, etc.)
  - Statistics
    - Your platform (ILLiad Web Reports, etc.)
    - OCLC Usage Statistics: http://www.stats.oclc.org/

- As you evaluate policies, consider Best Practices:
  - STAR Checklist: https://rethinkingresourcesharing.org/star-checklist-2/
  - IDS Workflow Toolkit: https://www.idsproject.org/press/WorkflowToolkit.aspx and IDS Answers

- Connect and ask:
  - Listservs: ILL-L, ILLIAD-L, DOCLINE-L, Workflow Toolkit, SHARES-L, etc.
  - Facebook group: ILLers
  - Local resource sharing groups and meetups
  - Resource sharing conferences: OCLC, IDS, regional conferences, etc. (Check out RSC 2022!)

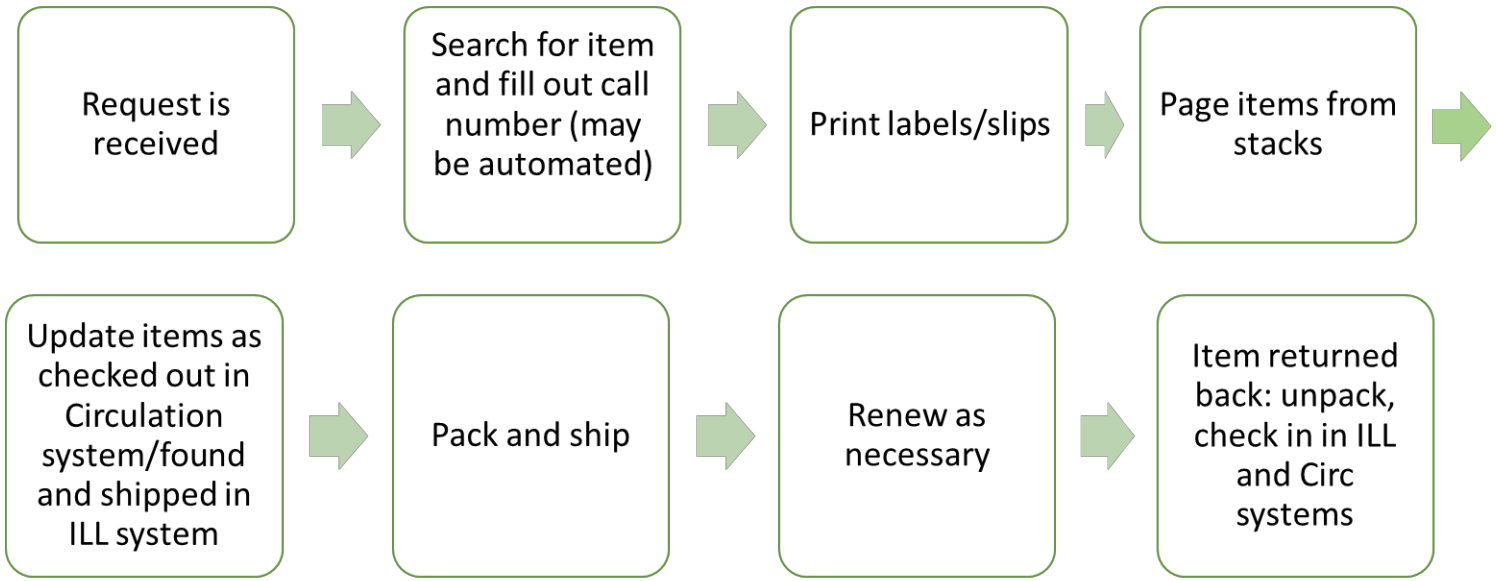
Setting up shop

- Physical space (receiving, processing, shipping)
- People: how many? F/T, P/T, work-study? Cross-train?
- Automations
- Equipment & Supplies: Double-monitors, scanners
- Systems & Privileges: Which RS networks (OCLC, DOCLINE, RAPID, etc.)? ILL software (ILLiad, etc.), ILS privileges? Admin privileges on your machine?
- Shipping & couriers: mailroom, couriers, budgets?

- Money matters
  - What is your budget?
  - Are you expected to recoup your costs?
  - Are you able to lend for free?
  - Can you join consortia?
  - If you must charge to recoup costs, can you lend free to free lenders?
  - Use IFMs as much as possible
  - International lending: IFLA vouchers

Workflows & Training

- Try everything out, test different possibilities.
- Listen to & incorporate feedback from staff
- Develop training documentation



- Lending Best Practices:
  - Fill only as requested:
    - Do not exceed Max Cost;
    - Editions, formats;
    - Check special Instructions
- Physical Loan Best Practices:
  - Efficiency, environmental impact
    - Book labels? Book bands? Return slips?
  - Packaging
  - Reduce, reuse (to a reasonable point!), recycle
  - Avoid “jiffy” envelopes
  - Handling issues: tracking, damage, losses (& reducing billing)

- Scanning Best Practices:
  - Complete (endnotes, illustrations; consider book title & copyright pages for chapters),
  - Legible (300dpi+, right side up)
  - Minimize black margins
  - Accessibility: can you provide OCR’d copies by default?
  - Odyssey, Article Exchange, Electronic Delivery Utility

- Electronic article lending:
  - Depend on licensing agreements: advocacy;
  - Do your discovery tools find an OA copy? Forward the info!
  - Find any glitches/errors? Communicate with your Electronic Resources librarian to fix the issue

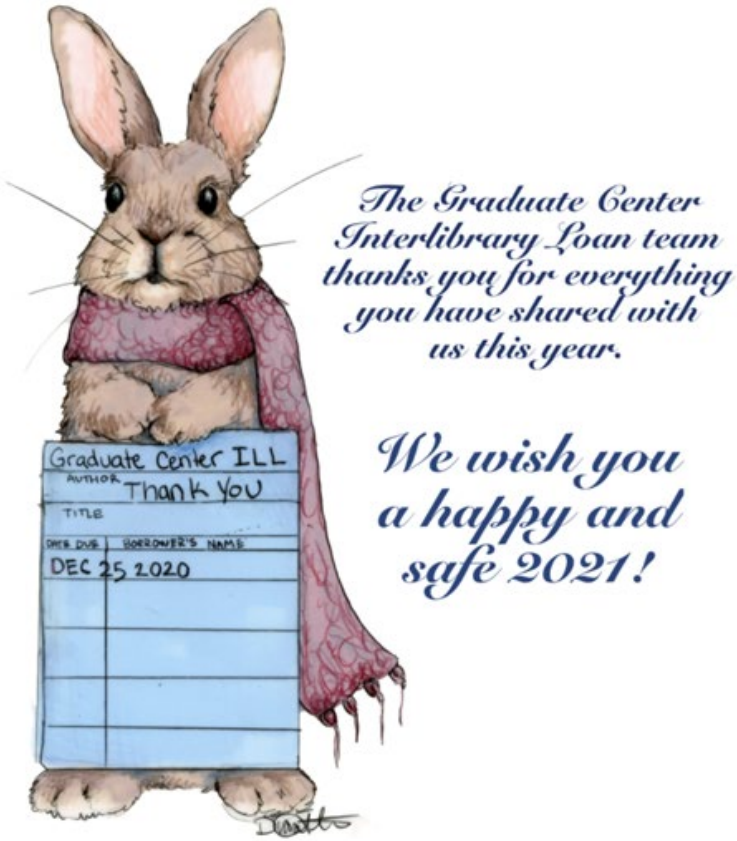
Communicate, communicate, communicate

- Clearly state policies:
  - Policies directory
  - Lending info in your website
  - Promptly respond to items you can’t fill
  - Use specific cancellation reasons

- Conditionals: when you have a question with intention/possibility to fill or going above and beyond with HELPFUL information
  - Good examples:
    - Maxcost $15IFM, OK?
    - In-library use only OK?
    - This might be another publication, OCLC#XXXXXXXX. We don't own that publication, please reply 'No'.
    - There is an OA copy of this: [link].
  - Not so good: "We don't own". Best to just cancel!
  - If you don't get the request back, it's not wanted.

Assessment/Feedback Loop

- See next session,Emily's Assessment 101
- Consider qualitative, as well as quantitative feedback
- Can use to improve services, but also to advocate and communicate with administration.



What's next? (102?)

- Automations: routing rules, IDS Logic…
- ILL & OA (discovery and giving referrals to OA; OA button)
- Lending whole e-books (VIVA, Occam's Reader…)
- CDL (see upcoming RSC2022 sessions)
- International lending (Shipping and customs; IFLA vouchers; groups with international partner libraries; RSCVD project; International ILL toolkit)
- Non-OCLC borrowers (lending outside of your usual system)
- Loan periods and renewals (can you lend for longer? Consider time and labor)
- Using data to make evidence-based decisions

References

- General
  - *Interlibrary Loan Code for the United States and Explanatory Supplement: Responsibilities of the Supplying Library*
  - OCLC's ***Interlibrary Loan Policies Directory***: https://illpolicies.oclc.org/
- Statistics
  - ILLiad Web Reports
  - OCLC Usage Statistics: http://www.stats.oclc.org/

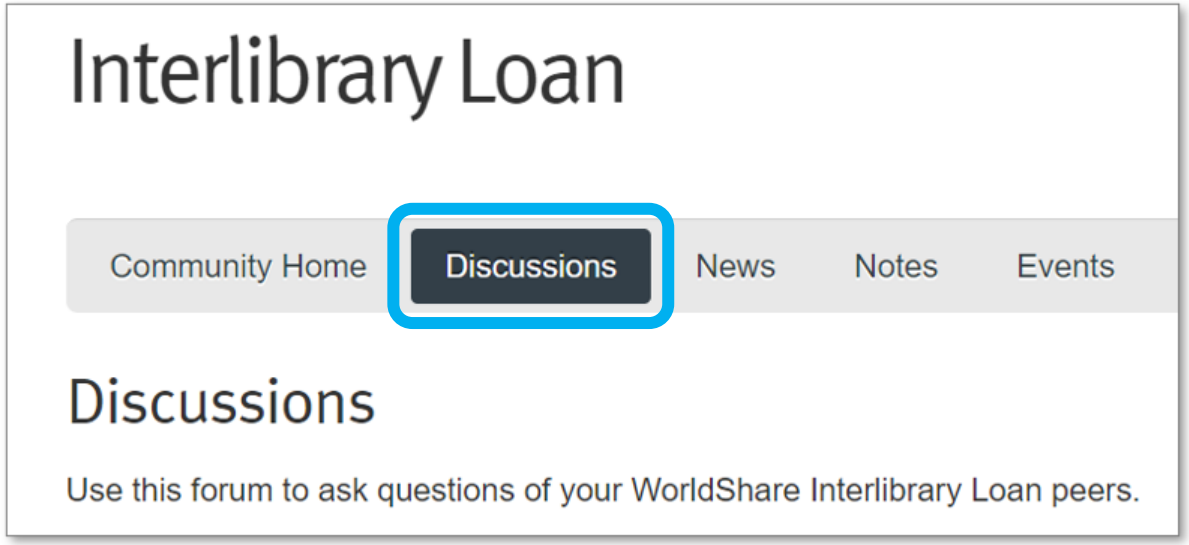
References (cont'd)

- Best Practices
  - STAR Checklist: https://rethinkingresourcesharing.org/star-checklist-2/
  - IDS Workflow Toolkit: https://www.idsproject.org/press/WorkflowToolkit.aspx
- Community
  - Listservs: ILL-L, ILLIAD-L, DOCLINE-L, Workflow Toolkit, SHARES-L, etc.
  - Facebook group: ILLers
  - Local resource sharing groups and meetups
  - Resource sharing conferences: OCLC, IDS, regional conferences, etc. (Check out RSC 2022!)
  - Journal: JILLDER
- Further Reading
  - Posner, B. (2016). *Library information and resource sharing* : *Transforming services and collections.* Santa Barbara, CA: Libraries Unlimited.

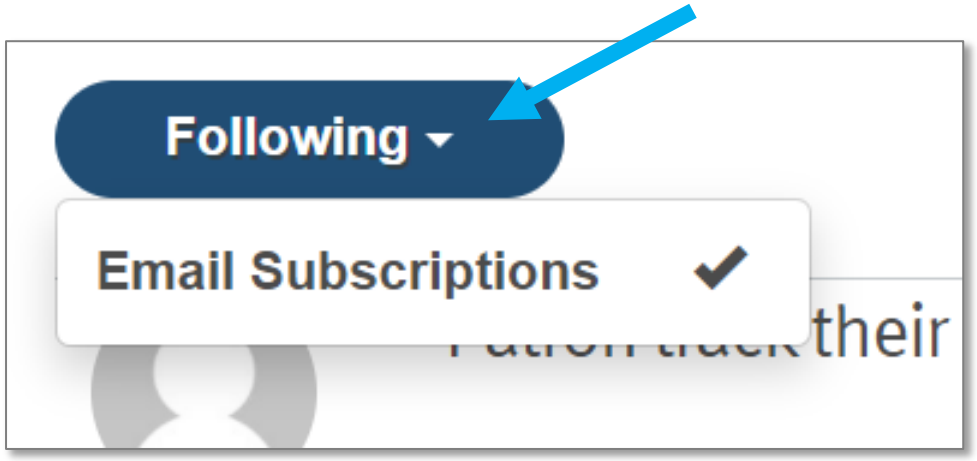
Continuing the conversation

Visit oc.lc/ill-discussion

1. Sign in with your WorldShare ILL username and password.
2. Open the thread on ILL 101: <copyright/borrowing/lending/assessment>.
3. Click **Post Reply** to **continue the conversation**.



All Tipasa, ILLiad, and WorldShare ILL users can participate in the Interlibrary Loan community. For assistance with sign-in, please contact OCLC Support (oc.lc/support).

Follow the conversation

To get email updates on this conversation, select Email Subscriptions.