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<tr>
<th>Date/Time</th>
<th>Title</th>
<th>Presenter(s)</th>
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<tr>
<td>Wed, April 6, 11:00 am EDT</td>
<td>Controlled digital lending for resource sharing: Law and policy since 2018</td>
<td>Kyle K. Courtney, Dave Hansen</td>
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<tr>
<td>Thurs, May 5, 12:00 pm EDT</td>
<td>Working smarter not harder: How to automate your holdings and configure policies to expedite fulfillment</td>
<td>Scott Brandwein, Helen Pinder</td>
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<td>Tues, May 10, 1:00 pm EDT</td>
<td>Lightning sessions</td>
<td>Brewster Kahle, Krista Higham</td>
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<td>• Resource sharing at the Internet Archive</td>
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<td>• E-book lending</td>
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<td>Wed, May 25, 2:00 pm EDT</td>
<td>The persistence of CONTU: The results of two surveys</td>
<td>Cindy Kristof, Meg Atwater-Singer</td>
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<tr>
<td>Tues, June 14, 11:00 am EDT</td>
<td>An update on your ILL services, and a look to the future</td>
<td>Peter Collins, Stephanie Spires</td>
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<td>Tues, June 21, 1:00 pm EDT</td>
<td>Controlled digital lending during global COVID-19 and beyond</td>
<td>Xuan Lily Pang, Peggy Glatthaar, Alvin Lee</td>
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</table>
Register at idsproject.org/OLI/index.aspx
LENDING 101

Prepared by: J. Silvia Cho
jcho@gc.cuny.edu
The Graduate Center, CUNY
IDS Project/Online Learning Institute
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 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/](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?
**CUNY The Graduate Center Library (ZGM)**

**Profile**

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• 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.)
• 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/](https://illpolicies.oclc.org/)

• Statistics
  • ILLiad Web Reports
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
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.