How to Share with Others: ILL Lending Inside and Outside of USG

GIL User Group Meeting
May 17, 2022
Agenda

• ILL Foundations
• Lending Policies
• Deflections
• Copyright vs. Contract
• Discussion

**We are librarians, not attorneys. None of the following is legal advice.**
Laying the foundation for lending
Codes

• Interlibrary Loan Code for U.S. Libraries
  • Written by RUSA's ILL committee
  • Adopted 1/11/16
  • bit.ly/3vIw4Pa

• Interlibrary Loan Code for Georgia Libraries
  • Written by GLA's ILL interest group
  • Adopted 12/15/16
  • bit.ly/3FgAX5d
Copyright

- Ensure vendor contracts allow use
- Borrowers are responsible for copyright adherence
- Copyright notices on materials being shared
- You may add additional limitations if desired
Foundational partnerships

- Administration
  - Lending policy
- Acquisitions
  - New purchases of books, e-books, databases, journals, etc.
- Cataloging
  - OCLC records
Contracts

• RUSA’s model clause (info->)
  • Standardization
  • Modernized
  • Permissive

• Detailed sample clause & examples from institutions using @
  • [http://liblicense.crl.edu/licensing-information/model-license/](http://liblicense.crl.edu/licensing-information/model-license/)
Who's responsible?

- Postage/courier
  - Lending library pays (charging can offset costs; non-consortial borrowers may pay when borrowing)
- Stickers/staples/supplies
  - Lending library pays
- Lost or damaged items
  - Requesting library must pay or replace
Analyzing Your Policies
Checking and Editing OCLC

- What are you sharing with other people?
- What have you decided not to share and why?
- How and where to edit?
Lending Groups & Loan Periods

• Lending groups
  • Lending groups are institutions who have decided to lend reciprocally with the other members

• Loans period—a way to control the volume of requests you receive

| Periods: | Loan Period: 4 Week(s) | Renew Period: 4 Week(s) |
Suspending Lending & Response Time

• Schedule
  • Holiday closures

• Suspending lending (under profile section)

• Response time is similar to loan period in that it can help control the number of requests you receive

Days To Respond:

Copies: 8 days
Loans: 8 days
Conditionals

• When in doubt, conditionalize.

• Why conditionalize?
  • Incorrect citation
  • Special conditions for lending
  • Exceeds max cost
  • Special shipping requirements
  • Not enough information/clarifying information needed

• Tips:
  • Try to make conditionals yes/no questions
  • Send emails
  • Be a good lender
Deflections
OCLC Deflection

• Policies Directory

• Local Holdings Records

• Knowledge Base Collections in Worldshare Collection Manager
Policies Directory

• Applied to the lender string

• Requests will route automatically to the next lender

• Auto-Deflection: Format Type
• Auto-Deflection: Profiled Group (covers profiled groups and Custom Holding Groups)
• Auto Deflection: Maximum Cost
• Auto Deflection: Age of Material
• Auto Deflection: Multiple Reasons
• Auto Deflection: Request Type
Local Holdings Records / Knowledge Base

WorldShare Interlibrary Loan can use the codes in 008 bytes 20 and 21 of your LHRs to automatically deflect ILL requests.

They can override or defer to your Policies Directory profiles as outlined below.

008/20 - Lending policy
Settings that will override Policies Directory Profiles
a - Will lend
b - Will not lend
c - Will lend hard copy only
Settings that will defer to Policies Directory Profiles
l - limited lending policy
u - unknown

008/21 - Reproduction policy
Settings that will override Policies Directory Profiles
a - Will reproduce
b - Will not reproduce
Settings that will defer to Policies Directory Profiles
u - unknown
Worldshare License Manager

- Create, search, and edit licenses

- Add ILL terms
  - Yes
  - No
  - Silent

- Create deflection policies
Deflections and Borrowers

• Inability to fill requests for users due to deflections related to electronic resources:
  • Print subscriptions replaced by electronic
  • Titles available electronically only

• Check your deflections! See if any are unnecessary or were entered into the system by a dept other than ILL

One request

Twelve deflections for format type
Copyright vs Contract
Physical Loans

• First Sale Doctrine
  • Section 109

• Institutional Policies
  • Bound Journals, Microfilm, Popular Reading, etc
eBooks

• Governed by license terms
• Occam's Reader
• Whole eBook lending (ex. VIVA)
• Chapters vs. Entire
Section 108

• Libraries and archives open to the public, or to unaffiliated researchers in a specialized field
• Not be made for commercial purposes
• Not systematic
• Must include a notice stating that the materials may be protected under copyright.
  • This material is subject to the U.S. Copyright Law: further reproduction in violation of that law is prohibited.
Copies from Physical Items

• Keeping track of CONTU is responsibility of the borrower
  • Indicate CCL and CCG
• Have an internal policy in place for your library on copy limits
  • How many chapters/articles per volume?
    • 10-15% of book
  • Page limit
• Include copyright statement
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Course Pack Note: Permitted
Course Reserve Note: Permitted

Interlibrary loan note: Allowed with Restrictions.
Staff ILL Note: Allowed as long as it is not prohibited by the publisher in the copyright statement accompanying the material.

Authorized User Definition: Current faculty, staff, students, walk in users, and individuals associated with the university.
Advocate for ILL

• Be Good Resource Sharing Partners
• Befriend Your Acquisitions Team
• RUSA Model License Clause

  • “Licensee may fulfill requests from other libraries or archives, a practice commonly called Interlibrary Loan. Licensee agrees to fulfill such requests in accordance with Sections 107 and 108 of the U.S. Copyright Act. Requests may be fulfilled using electronic, paper, or intermediated means, including but not limited to the prevailing technology of the day.”


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