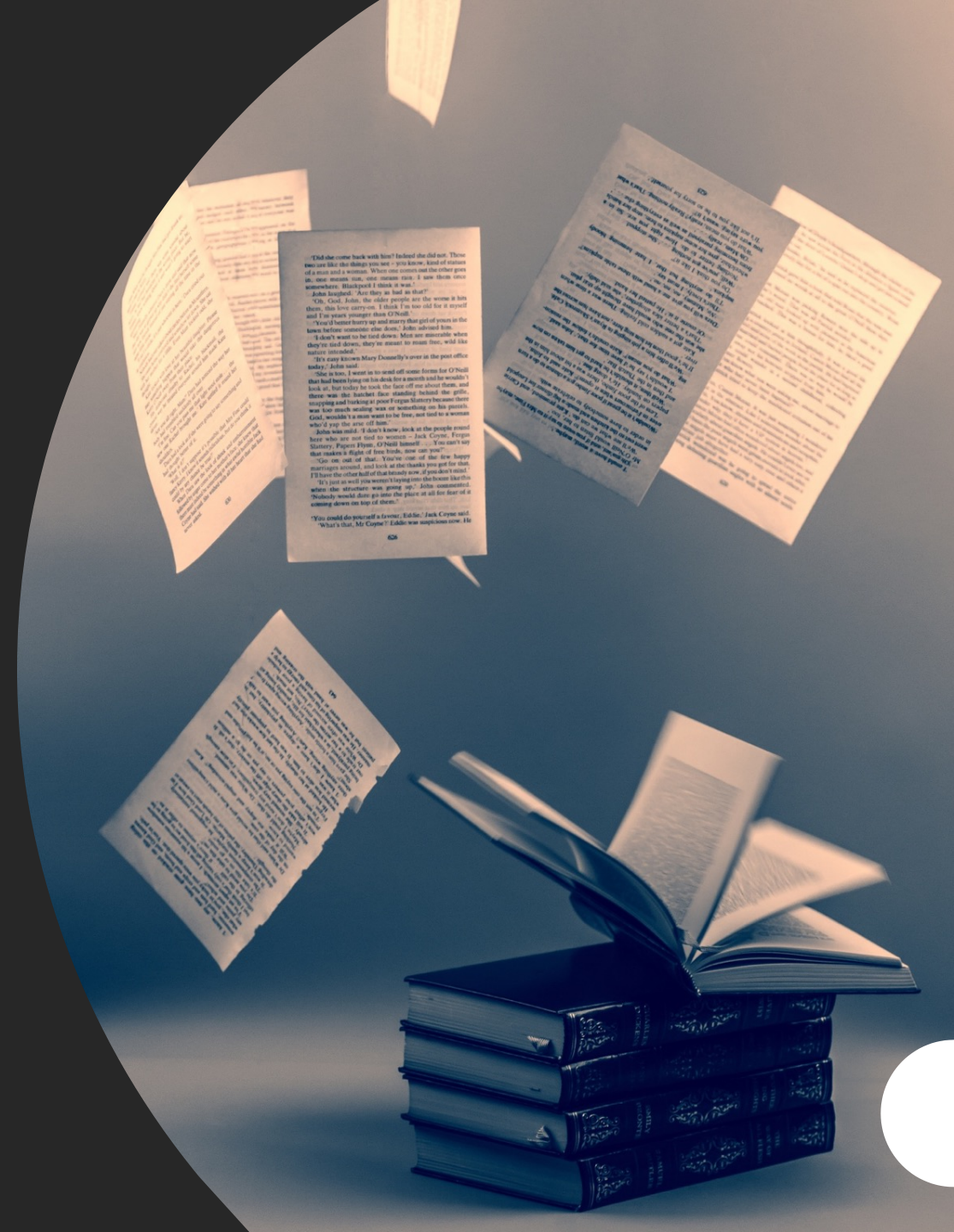


How to Share with Others: ILL Lending Inside and Outside of USG

GIL User Group Meeting
May 17, 2022





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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



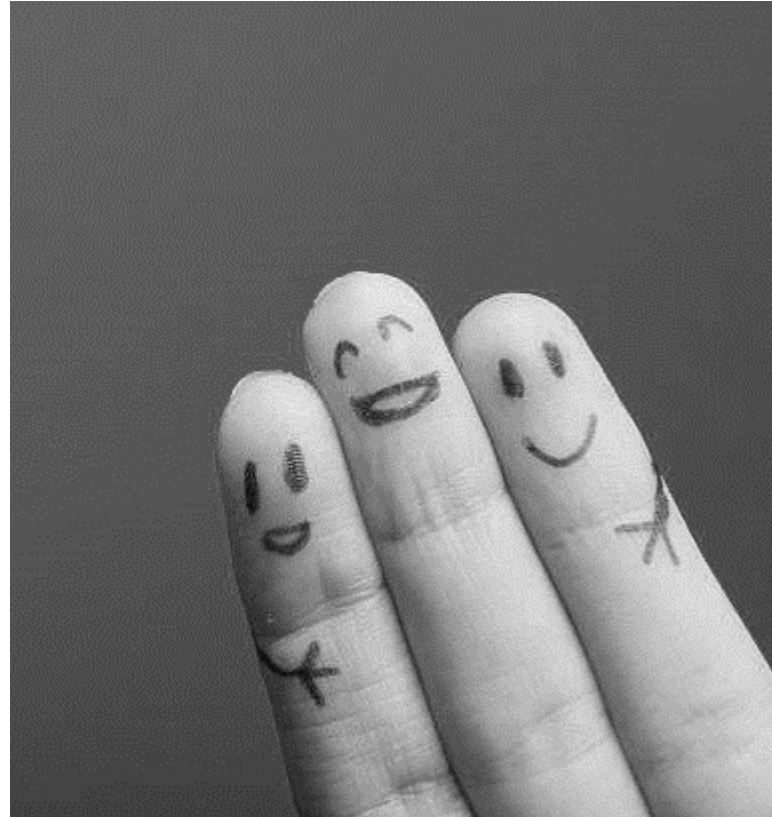
Copyright

- 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/>



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?

Deflections Add

AV / Non-book Format Loan Policy Edit Delete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <input checked="" type="checkbox"/> E-Audio Book <input checked="" type="checkbox"/> E-Serial <input checked="" type="checkbox"/> E-Text <input checked="" type="checkbox"/> Kit <input checked="" type="checkbox"/> Newspaper <input checked="" type="checkbox"/> Sound Recording <input checked="" type="checkbox"/> Sound Recording - Cassette <input checked="" type="checkbox"/> Sound Recording - CD <input checked="" type="checkbox"/> Sound Recording - LP <input checked="" type="checkbox"/> Visual Material <input checked="" type="checkbox"/> Visual Material - DVD <input checked="" type="checkbox"/> Visual Material - VHS
Note:			

Non-Print or Mixed Format Policy Edit Delete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <input checked="" type="checkbox"/> Computer File <input checked="" type="checkbox"/> E-Audio Book <input checked="" type="checkbox"/> E-Serial <input checked="" type="checkbox"/> E-Text <input checked="" type="checkbox"/> Integrated Resource <input checked="" type="checkbox"/> Internet Resource <input checked="" type="checkbox"/> Manuscript <input checked="" type="checkbox"/> Map <input checked="" type="checkbox"/> Microform <input checked="" type="checkbox"/> Newspaper <input checked="" type="checkbox"/> Serial <input checked="" type="checkbox"/> Sound Recording <input checked="" type="checkbox"/> Sound Recording - Cassette <input checked="" type="checkbox"/> Sound Recording - CD <input checked="" type="checkbox"/> Sound Recording - LP <input checked="" type="checkbox"/> Visual Material <input checked="" type="checkbox"/> Visual Material - DVD <input checked="" type="checkbox"/> Visual Material - VHS
Note:			

Augusta University (GJG)
Reese Library

Last updated Thursday, February 3, 2022 1:50:54 PM EST

Profile Collections Policies (4) Schedule Contacts

Summary

Name (Symbol): Augusta University (GJG)

Also Called: Reese Library

Location: Augusta, GA 30904-2200 US

Shipping Address: GJG-default
ILL/Reese Library
2500 Walton Way
Augusta, GA 30904-2200 US

Institution Type: Academic Library

OCLC Supplier: Yes [Edit](#)

Days To Respond: Copies: 8 days [Edit](#)
Loans: 8 days [Edit](#)

Non-Circulating: Periodicals; Reference collection; Course Reserves; Special Collections; Richmond County Historical Society collection; Microfilm; Microfiche; A-V material; Computer files. Any items located at Media Services or the Curriculum Lab. [Edit](#)

Periods: Loan Period: 4 Week(s)
Renew Period: 4 Week(s)

Fees: Copies: 15.00 USD [More](#)
Loans: 15.00 USD [More](#)

Request Methods: Copies: ALA, OCLC ILL
Loans: ALA, OCLC ILL

Delivery Methods: Copies: Article Exchange, Mail, Odyssey
Loans: Mail

Group Affiliations: [GEORGIA ONLINE DATABASE](#), [LIBRARIES VERY INTERESTED IN SHARING](#), [OCLC TRAINING & ILLIAD PARTICIPANT](#), [S06 GAC/UL](#), [SOLINE](#)

International Lender: Copies: Canada
Loans: Canada

Last updated Thursday, February 3, 2022 1:50:54 PM EST

Profile Collections **Policies (4)** Schedule Contacts

Deflections Add

Copies Edit Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies: • Microfiche • Microfilm • Photocopy	Per Request: • 15.00 Currency: United States Dollar Tax Included: No	Groups: <input checked="" type="checkbox"/> GLSD <input checked="" type="checkbox"/> SIXX Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Canada <input checked="" type="checkbox"/> United States	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> E-Serial <input checked="" type="checkbox"/> E-Text	Requests: 1. OCLC ILL 2. ALA Delivery: 1. Mail 2. Odyssey 3. Article Exchange Billing: 1. OCLC IFM 2. Invoice with Item
Note: No charge for GOLD and SO6 or libraries which we have a reciprocal agreement. We do charge for "SOLINE" copies. We are no longer using Ariel. We charge international \$20.00.				

Loans Edit Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None Loan Period: 4 Week(s) Renewal Max: None Renewal Period: 4 Week(s)	Per Request: • 15.00 Currency: United States Dollar Tax Included: No	Groups: <input checked="" type="checkbox"/> GLSD <input checked="" type="checkbox"/> SIXX <input checked="" type="checkbox"/> SL#N Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Canada <input checked="" type="checkbox"/> United States	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> E-Serial <input checked="" type="checkbox"/> E-Text <input checked="" type="checkbox"/> Kit <input checked="" type="checkbox"/> Microform <input checked="" type="checkbox"/> Serial <input checked="" type="checkbox"/> Serial - Bound <input checked="" type="checkbox"/> Serial <input checked="" type="checkbox"/> Unbound <input checked="" type="checkbox"/> Sound Recording <input checked="" type="checkbox"/> Visual Material	Requests: 1. OCLC ILL 2. ALA Delivery: 1. Mail /
Note: We do not charge GOLD, SOLINE, LVIS, or libraries that we have reciprocal agreements. We charge international \$20.00. We do not lend our Special Collections, Richmond County Historical or Reference material.				

Lending Groups & Loan Periods

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

Group Affiliations:

[GEORGIA ONLINE DATABASE](#) , [LIBRARIES VERY INTERESTED IN SHARING](#) , [OCLC TRAINING & ILLIAD PARTICIPANT](#) , [SO6 GAC/UL](#) , [SOLINE](#)

- 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

Augusta University (GJG)
Reese Library

Profile Collections Policies (4) **Schedule** Contacts

Last updated Thursday, February 3, 2022 1:50:54 PM EST

Operating Hours [Add](#)

Regular Operating Hours [Edit](#) [Delete](#)

DAYS	HOURS	NOTES
Monday thru Friday	8:00 AM to 5:00 PM	Hours cited are Eastern Standard Time

Closures [Add](#)

Holiday [Edit](#) [Delete](#)

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	11/24/2021 thru 11/26/2021	No	Thanksgiving Break

Holiday [Edit](#) [Delete](#)

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	12/14/2021 thru 01/03/2022	No	Winter Break

- Suspending lending (under profile section)

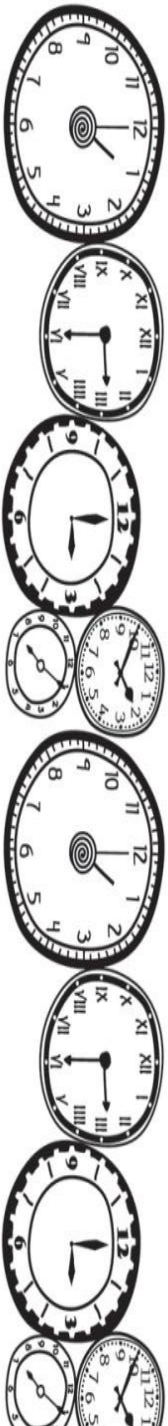
OCLC Supplier: Yes [Edit](#)

- 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 [Edit](#)

Loans: 8 days [Edit](#)



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

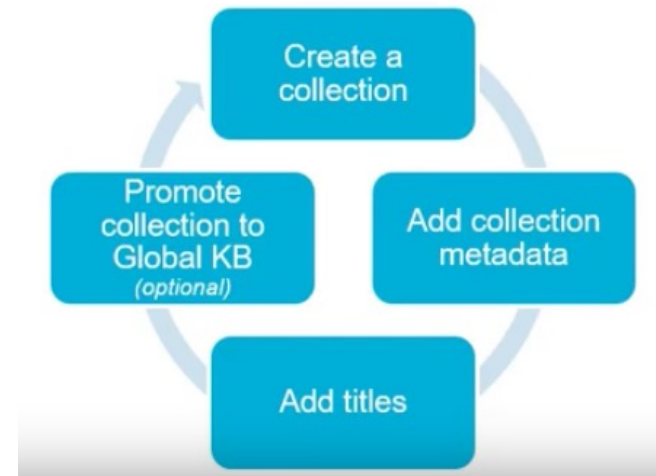
Settings that will override Policies Directory Profiles

a - Will reproduce

b - Will not reproduce

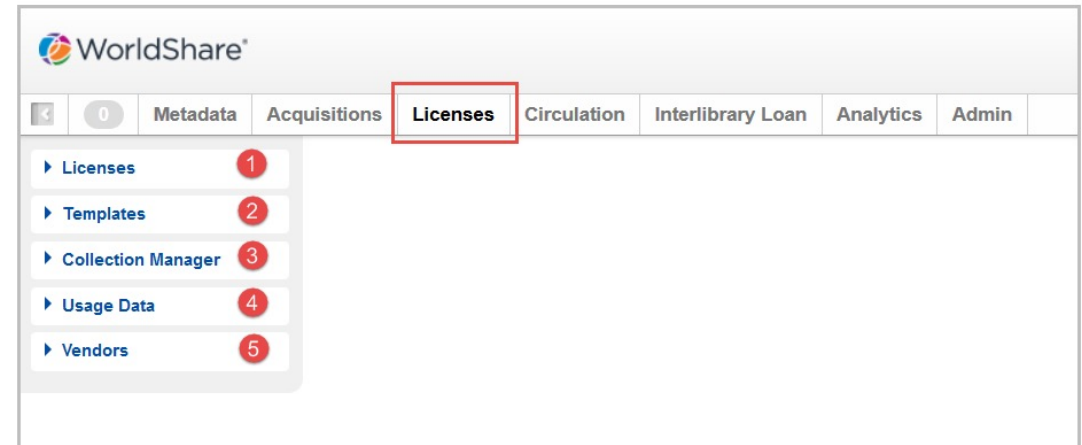
Settings that will defer to Policies Directory Profiles

u - unknown



Worldshare License Manager

- Create, search, and edit licenses
- Add ILL terms
 - Yes
 - No
 - Silent
- Create deflection policies



Status: Active

ILL=Silent

Collection on license: OhioLINK

Electronic Journal Center

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

DEFLECTION_FORMAT_TYPE (20220225-125219)
DEFLECTION_FORMAT_TYPE (20220225-125219)
NOT_OWNED (20220228-185342)
DEFLECTION_FORMAT_TYPE (20220228-185351)
DEFLECTION_MULTIPLE_REASONS (20220228-185351)
DEFLECTION_FORMAT_TYPE (20220228-185351)
(20220301-155145)
DEFLECTION_NOT_CURRENTLY_A_SUPPLIER (20220301-155152)

One request

Twelve deflections for format type



Copyright vs Contract



Physical Loans

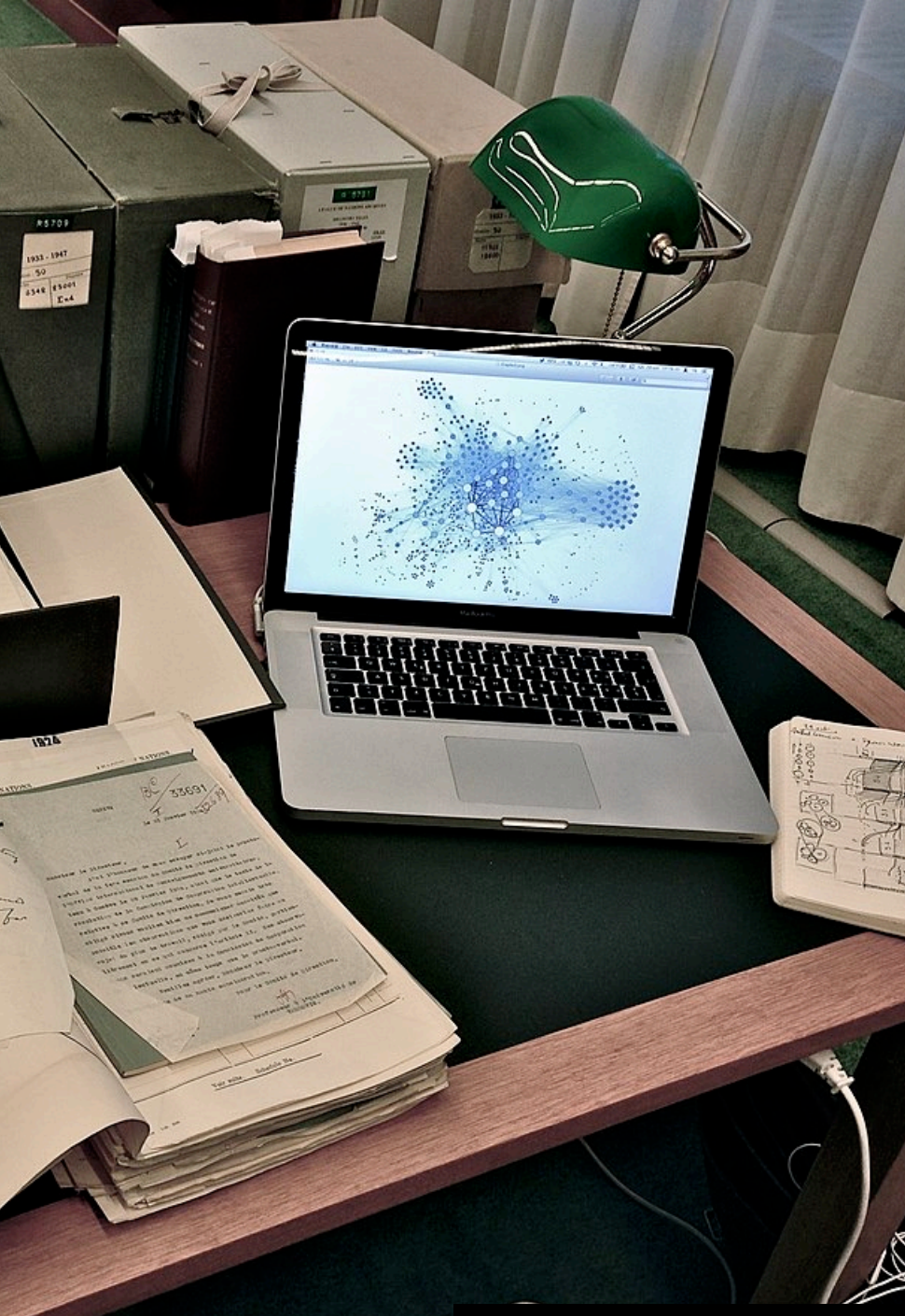
- First Sale Doctrine
 - Section 109
- Institutional Policies
 - Bound Journals, Microfilm, Popular Reading, etc



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



Know Your License Terms

- Contracts dictate use
- Yes, Restriction, No, Silent
- Example Restrictions
 - Non-commercial, academic only
 - Paper copy by mail
 - No email
 - Keep track of usage





Example Clauses

Customer shall not provide any material from any Product to fulfill an interlibrary loan request from another library or organization.

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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.”

<https://rusaupdate.org/2019/08/approval-of-rusa-stars-legislation-and-licensing-model-license-clause/>

Authorized Users may download search results to hard disk or diskette

an Authorized User may not make [company name] journals available electronically to anyone other than another Authorized User, whether by telephone link or by permitting access through a terminal computer

Let's Review

1

Understand
guidelines

2

Review your
policies

3

Double check
deflections

4

Know your
license terms

5

Advocate,
Advocate,
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