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How One Part-Time Library Staff Member Can Provide Interlibrary Loan Service

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ABSTRACT. Interlibrary loan is an integral part of library service, but it is a time and resource consuming endeavor. This article presents several time and cost-saving policies and procedures that will provide interlibrary loan service in very small interlibrary loan departments. doi:10.1300/J474v17n04_10 [Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2007 by The Haworth Press, Inc. All rights reserved.]

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HOW ONE PART-TIME LIBRARY STAFF MEMBER CAN PROVIDE INTERLIBRARY LOAN SERVICE

Interlibrary Loan is one of the most important services a library can offer. Small libraries have more of a need for interlibrary loan, especially on the borrowing side, than larger ones. They usually do not have the staff and resources for a full-fledged interlibrary loan department.

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Although the amount of time and attention interlibrary loan takes is discouraging, both lending and borrowing services are essential. In order to offer interlibrary loan without overwhelming a small staff, it is essential to use various time-saving measures.

This article will describe policies and procedures that are used in the St. Mark's library, as well as others that were gathered in response to an E-mail solicitation to several listservs. St. Mark's Library is a net lender with approximately 400 lending requests (half of them filled) and 45 borrowing requests per year. St. Mark's does not use any specialized software such as Clio, Illiad, or Ariel. Almost all interlibrary loan transactions are conducted through OCLC Resource sharing. St. Mark's Library also accepts requests by fax or mail.

DEFINITION OF AN "ON-THE-FLY" INTERLIBRARY LOAN DEPARTMENT

There are several ways to characterize this particular type of interlibrary loan department. For convenience, this paper uses the term "On-the-Fly." To describe an interlibrary loan department where one person conducts all interlibrary loan activities but has other primary duties. The term is not used disparagingly, but indicates that interlibrary loan tasks are completed in a "get it done" manner. An "On-the-Fly" department is different from a one-person interlibrary loan department. A one-person department implies that interlibrary loan is the staff member's primary duty, and interlibrary loan takes up the bulk of his or her working hours.

RESOURCES IN INTERLIBRARY LOAN AND DOCUMENT DELIVERY FOR BEGINNERS

Most interlibrary loan literature is written for large interlibrary loan departments. Although this can help an "On-the-Fly" interlibrary loan librarian, it takes a while to choose which information and new ideas are applicable to a particular institution. For example, quite a bit of interlibrary loan literature discusses new software and equipment, but it is often impossible for a small department to justify the expense of such products.

There are two books that can be useful to even the smallest of departments. Virginia Boucher's *Interlibrary Loan Practices Handbook*,

though dated, introduces interlibrary borrowing and lending. The “On-the-Fly” staff member can review the suggested policies and procedures and decide what is best. Mary Jackson’s *Assessing interlibrary loan/DD Services: New Cost-Effective Alternatives*, although clearly geared toward large research institutions, also offers cost-saving procedures that can be used in any library.

It is important for an “On-the-Fly” department staff to be aware of what is available in new technology even if they decide not to use it. If there is time, subscribing to interlibrary loan journals and listservs can be invaluable. Communications from OCLC regional service providers can also help staff members keep track of changes to OCLC Resource Sharing. OCLC offices distribute newsletters, offer training in resource sharing and employ experts who can help you or refer you to someone knowledgeable in the field.

By e-mailing listservs, one can learn how small libraries, all over the country, handle interlibrary loan. Methods range from the archaic (doing everything on paper) to cutting edge. Many of the libraries that replied to the survey, train student workers or volunteers to perform interlibrary loan tasks. It is a way to get interlibrary loan tasks accomplished if it becomes too overwhelming for one person.

GOOD POLICIES

All interlibrary loan departments, even the smallest, should take Leslie Morris’ admonitions in “Why Your Library Should Have an Interlibrary Loan Policy and What Should be Included” to heart. Most of the time-saving measures detailed below are policy decisions. In many libraries, interlibrary loan policies and procedures are often inherited and may be out of date. Taking the time to evaluate current policies carefully will save time.

My non-scientific survey of “On-the-Fly” departments indicates that some institutions are not taking advantage of changes in technology that could greatly reduce the amount of time spent on interlibrary loan. It may have made sense ten years ago to print everything and keep a notebook, but new technology allows most transactions to take place electronically. Keeping a paper trail can consume staff-time and resources without providing any tangible benefits.

The less time one has to devote to interlibrary loan, the more stringent policies may need to be. While an institution’s own patrons come first and all borrowing requests should be researched and processed, lending

requests can be triaged when there is limited time. It is important to remember that borrowing libraries prefer that requests that will not be filled are forwarded quickly so that they can be filled by another library.

IDEAS FOR BORROWING

Who

In an “On-the-Fly” department, it is important to identify and sometimes limit who is eligible to use borrowing services. *Assessing Interlibrary loan/DD Services: New Cost-Effective Alternatives* states that user-initiated interlibrary loan is a cost-effective borrowing method. Although St. Mark’s Library, nor any of the libraries that responded to the survey, use it. This is probably because it takes quite a bit of time to complete the initial setup. However, since it has been proven to be effective, “On-the-Fly” departments should consider implementing user-initiated borrowing.

When

Even in tiny departments, borrowing requests should be processed as soon as possible. This may seem obvious but when there are no paper requests, a staff member must log into the interlibrary loan management software almost every day to check for pending borrowing requests. It is easy to forget to check when it is not a “processing day.” Establishing a time to check for requests every day (e.g., right after lunch) is a good way to make sure that the task is completed.

What

Libraries with a small staff can also maintain a policy of not borrowing materials that are available at the local public library or at libraries with reciprocal borrowing privileges. Although patrons prefer to have the materials they need delivered to them, this policy can greatly reduce the number of borrowing requests.

Fees

Library budgets are tight and interlibrary borrowing can be expensive. Charging patrons interlibrary loan borrowing fees can help, but

only if too much time and effort are not expended trying to collect the fees. A few of the surveyed libraries mentioned that they simply add the borrowing fee to the patrons' library record. This eliminates the need to generate paper invoices for patrons and saves processing time. Other institutions simply do not charge for interlibrary loan service because it eliminates record keeping and collection duties.

Many libraries try to borrow from institutions that do not charge fees because of either consortia agreements or institutional policies. If a charge is assessed, the interlibrary loan fee management (IFM) system makes keeping track of these fees much easier. (IFM is discussed later.)

Keeping Track

Keeping track of borrowed material is probably one of the most vexing problems in interlibrary loan. Some institutions add an interlibrary loan item to patron records so that the material can be tracked with other items borrowed from the library. This can be a workable solution if adding dummy items to your circulation system is not too onerous.

If you do not have a system that automatically prints out straps or labels, coming up with visual cues for interlibrary loan books can take some ingenuity. Handwriting "ILL" and the due date on removable labels that are placed on borrowed books is one solution. It is important to be aware, however, that these labels can be expensive and some lenders do not want them used on their books.

Running a "borrowing library" search on OCLC Resource Sharing every so often will help remind the staff member of what is currently borrowed. If an item is due in the near future, the staff member can send a reminder E-mail to the patron. Communicating with patrons via E-mail reduces the need for more time-consuming phone calls or mailed notices.

IDEAS FOR LENDING

Interlibrary lending is the area where an "On-the-Fly" department can save the most time. Remember that not all requests must be filled since other libraries, with the same material and more people on staff, can also fill the request. This may seem obvious, but librarianship is a service profession. Most librarians do everything they can to get a patron what they need, even if that patron is halfway across the country. It

is important to remember, however, that interlibrary loan only functions when libraries are willing to lend materials, and when each institution participates in the system fully and fairly.

Who and When

Always triage your requests. This can be difficult. How do you decide that one request is more important than another is? One way is to establish a hierarchy for requestors. Lending requests from consortia and affiliated libraries are always completed; others are moved further down the queue. Some libraries complete incoming requests on particular days of the week. On slow days, however, check the pending queue to see if there are any requests that can be filled quickly or to see if your institution is the only one listed in the queue.

What

In order to save time and resources, it makes sense to consider not lending any special collection material or theses because of their rarity and the increased need for careful packaging, tracking, etc. Sending only circulating books and articles reduces the amount of preparation time required for each item.

Carefully wrapping interlibrary loan items is recommended in the *Interlibrary Loan Practices Handbook* (Boucher 1997, 60), but it seems unnecessarily excessive for a \$20 book to be sent in a padded envelope. Instead, eliminate the need for extra wrapping by having a policy of only sending books that are robust enough to withstand the shipping process.

Fees

OCLC's IFM system has eliminated the need for invoices. "If an institution does not use IFM, and they charge for borrowing, we will not lend to that library." This might seem overly harsh, but it takes more resources to create, print, and mail an invoice than what a \$15 fee recovers.

Keeping Track

Some libraries create an individual patron record in their circulation system for each borrowing library. However, it is easier to keep track

of interlibrary loan lending by creating a single interlibrary loan patron in the circulation system. Allowing a generous lending period of 6 months may be necessary if items are shipped via Library Rate. (The lending period suggested in OCLC Resource Sharing is one month.) All notices for the account are sent to the interlibrary loan staff member who can then contact the library by e-mail or phone. A long, six-month, lending period ensures that this rarely occurs.

GOING PAPERLESS

Most of the suggestions above have one factor in common—they use as little paper as possible. Interlibrary loan is the best area to implement the paperless office. There is no need to duplicate information that is readily available electronically.

Computer-based management systems; OCLC Resource Sharing, Clio, and Illiad, keep track of transactions including the titles of all loaned items and the names of all borrowing libraries. When borrowing, it is best to fill out the online form as completely as possible so that on retrieving a record it provides all needed information. It is not necessary to print lending requests until they are filled. A copy of the request is placed in the book for shipment.

Going paperless means using as many electronic interlibrary loan resources as possible. “On-the-Fly” departments cannot afford software, such as Ariel, for electronic transmission of articles, but a decent scanner is all that is needed to send articles to a patron’s e-mail address or to a borrowing library. Illiad’s Odyssey program, which allows electronic article delivery between Odyssey libraries, is now available, free, to all libraries for downloading.

GETTING INTERLIBRARY LOAN DONE

The above suggestions may seem counterintuitive to some of the fundamental philosophies of librarianship. Instead of saving the patron’s time, they save staff time. The ideas will allow any library, no matter how understaffed, to begin to provide expected and valuable interlibrary loan service to patrons.

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APPENDIX

E-mail Questionnaire

In May 2006, I sent an initial E-mail to NewLib, ATLANtis, GSLIS (UIUC) Discussions and GSLIS (UIUC) Alumni to find libraries that had an interlibrary loan department that matched my definition of "On-the-Fly" libraries. The following questions were sent to all who responded:

1. How many hours a week do you spend on interlibrary loan? Is the work done on certain days or throughout the week?
2. How do you manage incoming and outgoing requests? Do you use computer software to do interlibrary loan?
3. If you charge for the service, how do you keep track of the invoices and money?
4. Is someone else in your library trained to do interlibrary loan if you are away?