# EAST ILL Best Practices

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BLC
BOSTON LIBRARY CONSORTIUM

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# EAST ILL Policy

A reminder on the EAST policy for Fulfillment and Delivery included in the Major Operating Policies document approved by the Executive Committee last October:

"EAST members strongly support a practice of free lending across the member libraries. EAST members may use their own institutional policies to fulfill requests for EAST holdings. Libraries may opt out of this policy. Libraries that choose to opt out of free lending may be charged to borrow from any other EAST member at the lending member's discretion."

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# The ILL Working Group

- Most – if not all – of the current EAST members support no-charge lending
- Working Group formed to develop recommended best practices
- Members:
  - Angie Batson, Wellesley College
  - Patrick Carr (EC liaison), UConn
  - Dzintra Lacis, Brandeis University
  - Rachel Manning, Middlebury College
  - Erika McNeil, UConn

- David Perry, Bryn Mawr College
- Ethan Powers, Mount Holyoke College
- Nicholas Triggs, Loyola/Notre Dame
- Gwen Verkuilen-Chevalier, Saint Anselm
- Sally Weed, University of Rochester
- Tom Zaharevich, Trinity College

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# Organization of the Best Practices

- General principles

- Operational guidelines

- Specific principles and operating guidelines for borrowing and lending separated

- Returnables and non-returnables separated

- Intended as RECOMMENDATIONS not policies as we recognize not all libraries will be able to adhere to each best practice

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# General Principles

- Extend borrowing broadly across the collection – do not limit to EAST retention items

- Adhere to the principles of the ILL Code for the U.S.

- Per the MOU, provide items at no charge to other EAST institutions (institutions that do not freely lend may be charged to borrow)

- Ensure that ILL and other staff, such as student workers, understand the goals of EAST and are familiar with these best practices

- Treat borrowing and lending with equal importance

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# Operations

- Prompt and efficient service with courier delivery if possible and tracking at the item level

- Include necessary paperwork

- Provide electronic delivery and receipt when possible

- Ship and receive daily (business days)

- Use packaging that is appropriate for the items that will protect them from damage or loss

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# Operations for OCLC users

- Use an ILL system that can interface with OCLC WorldShare ILL
- Communicate via the ILL system with appropriate notes and message
- Monitor alerts and respond in timely fashion
- Set up custom holding group for EAST
- Ensure local lending policies and contact information is up-to-date in the OCLC Policy Directory

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# Borrowing

- General
  - Ensure patrons placing requests are active
  - Do not borrow for reserve unless the loaning library agrees
- Returnables
  - Assume responsibility for the items from the time they leave lending library to the time they are returned
  - Respect lending library's policies, including any special shipping or usage instructions
  - Return items within time requested using method requested
  - If item cannot be renewed, first attempt to borrow from another institution

# Borrowing (con't)

- Operations for Returnables
  - Return paperwork with materials
  - Use any shipping label provided; if none, clearly label with address provided
  - Respond to overdue and recall messages promptly
  - For OCLC customers: use OCLC for renewal requests rather than phoning

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# Lending

- Lending operations
    - Use "reasons for no" when request cannot be fulfilled
    - Respond to all requests within 1 business day
    - Process requests throughout the day
    - Communicate via the system when possible, but if an issue arises, contact the ILL personnel directly via phone or email
    - Use "conditional" as indicated in the Best Practices
        - More information needed
        - Additional time need to respond
        - When the citation is incorrect

# Lending (con't)

- Operations for OCLC users
  - Use the OCLC Policy Directory to indicate a non-lending status
  - If you choose to charge EAST, indicate fee structure in Policy Directory and alert the EAST Project Team so institutions may be notified

- Operations for lending of returnables
  - Allow 8 week loan period and renewals if possible
  - Include proper identification paperwork with item
  - Recall only when necessary
  - If lent item is returned damaged or lost, invoice within 6 months.  Or, accept a replacement copy [per EAST's guidelines]

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# Lending (con't)

- Operations for lending non-returnables
  - Use Odyssey [or RapidILL or equivalent] if possible.; Article Exchange if not with email as a last resort
  - Send Conditional before changing to an article request
  - Respond to resend requests within 1 business day
- Digital files for non-returnables
  - Supply a searchable OCR document or one that is accessible whenever possible.  If searchable PDF is requested and not available, so indicate via "conditional"
  - Provide a native digital PDF [in color] when possible; scan from print only when electronic copy not available

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# Lending (con't)

- Digital files for non-returnables (con't)
  - Scan using 300 dpi or higher, color if requested.  Use highest resolution appropriate to the content but be mindful of file size
  - Do not limit by number of pages unless copyright requires it
  - Scan with consistent page size and orientation with single page per scan
  - Include any supplemental materials (footnotes, plates…)

**Thanks to the Working Group for their excellent work.**

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# Thank you.

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