

FIL Newsletter Issue 30

Interlibrary lending common standards for best practice

**A Code of Practice issued by CONARLS
(on behalf of the UK and Ireland Library Regions, the British Library and the Forum for Interlending)**

BORROWING LIBRARY

Materials generally excluded from Regional Schemes...

- Quick reference material, current yearbooks, annuals, directories, encyclopaedias, bibliographies
- Items which are in print and cheaper to buy than borrow
- Some regions have a monetary limit. eg. Exclude popular books in print costing less than £15
- Fiction in English in print, though some libraries may be willing to supply if not in demand by their own users
- Children's books in print, though some libraries may be willing to supply if not in demand by their own users

Untraceable items...

- Requests for items which cannot be bibliographically verified should be sent only to the requesting library's own Regional HQ, although if they have a specific geographical bias they be sent to appropriate regional HQ. Note: such requests may also be sent to BLDS

Obtaining locations...

- When obtaining locations from Regional HQs use fax or email where possible to save time
- Only use the phone to request locations for up to three items at a time
- Locations for items in foreign languages should be requested in writing

Forms...

- Type or write clearly; typed requests should be checked for accuracy
- Details on FRONT of form should include: author, title, edition, editor, translator, imprint, ISBN/BNB/LC numbers, source of reference
- Photocopies of a reference should identify the source, including date if from a serial publication
- Ensure that there is adequate space on the form for supplying libraries to put the date and their report on the request
- Do not add compliment slips or other unnecessary pieces of paper

- ISBNs or other standard control numbers, where known, should be on the front of the form (it is over-optimistic to assume that a busy ILL assistant will ferret through several attachments to find this information)
- Forms sent outside own Region must include a BL Form Number

Chasing requests...

- Do not chase postal requests before six weeks
- Users of automated requesting systems should follow the system guidelines on chasing

Other Points...

- Requesting libraries should observe loan periods (which vary), and should not allow borrowers to renew an ILL beyond the loan period set by the supplying library without first consulting that library
- Follow specific instructions for music sets, play sets, CILLA items, etc
- Fiction - either the JFR location or other locations found on union databases may be used, though the latter may be subject to restrictions imposed by the holding library
- Consider buying books which are in demand over a period of time

Transport Scheme...

- Before opening parcels, check they are all addressed to your library - redirect immediately any that are not
- Any unsolicited items received should be returned at once to the owning library

And...

- The borrowing library is responsible for loss or damage to any item

SUPPLYING LIBRARY

Can...

- Refuse to lend an item
- Impose conditions of use
- Determine the replacement cost for lost or damaged items

Should...

- Use standard codes in replying; use BL codes where possible when replying to out of region requests
- In replying "O/L", give the date due back and/or indicate willingness to reserve. Negative replies (NIS, D/L etc) should be given as quickly as possible and the form passed on to the next library on the rota or returned to the requesting library
- Report on requests clearly and legibly so that they can be easily interpreted

- Use the rota boxes on the back of BL forms where possible
- Attach information if other editions with locations are found
- Detach unnecessary compliment slips etc before sending the request onto another library

Should not...

- Add locations to the rota; the requesting library will not know where the request is; however, if you do find more locations it is helpful to include them in your report

Transport Scheme...

- Ensure that the destination is served by a transport scheme
- Address items clearly
- Use correct vouchers
- Cancel all old addresses and vouchers when re-using packaging
- When sending music or drama sets in more than one box please write the title of the work on the outside of the box and "box 1 of 3", etc. so that sets can be kept together and directed without unpacking. Each box must carry a transport voucher

REGIONAL MEMBER

Should...

- Notify additions and deletions to stock to Regional HQ regularly, including extra-MARC material, and/or co-operate in the development of virtual catalogue clumps
- Supply ILL statistics/nil returns
- Observe regional ILL procedures
- Inform Regional HQ immediately of amendments to contact details

REGIONAL HQs

Do...

- Maintain union catalogues: automated, manual, general and specialised
- Receive requests by post, fax, email etc
- Check union catalogues and supply locations for members and non-members by post, fax, phone, email etc
- Provide advice and training
- Hold meetings for members

May...

- Receive requests by phone
- Rota requests for members if wished for by member
- Provide bibliographic checking for in-region requests
- Process subject requests for members

- Provide subject searches/bibliographic research for members
- Arrange loans (for urgently required items)
- Administer subject specialisation schemes
- Provide bibliographic checking for out-of-region requests

Do not...

- Maintain a record of requests received (with some exceptions)
- Rota requests from other regions (occasional exceptions)

Note: The regional HQs response times vary according to method of working; please see individual region's codes of practice.

WHY A CODE OF PRACTICE?

Across the UK and Ireland library network, resource sharing through Interlibrary Lending (ILL) and Document Supply remains a significant area of collaborative activity. Quite apart from the one million or so items supplied to them by the British Library Document Supply centre, organisations in membership of the Library Regions interlend amongst themselves around a further 0.5 million items in a typical year.

The support services provided by each Library Region, based on the two main shared systems (Unity and VISCOUNT), make a major contribution to the comprehensive access which public libraries are obliged to provide.

Following "Why Requests Fail", the research project sponsored by the British Library research and Innovation Centre, CONARLS members have attempted to develop some common standards for ILL activity to encourage greater efficiency and effectiveness.

This code of practice focuses on the things that the HQ of a Regional System, a regional member, a borrowing library or a supplying library might be expected to do, or not do, regardless of which sector or network it might belong to. Additional to these, there will be rules and standards applicable within individual regions or groupings. You should ask your regional HQ about what you, as a member organisation in your particular part of the UK and Ireland, are expected to do.

We hope this very basic guide will improve the everyday operation of ILL. Any comments should be addressed to the Regional Library System HQs (contact information can be found on the [CONARLS Web site](#)).

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