

ILLINOIS STATE LIBRARY
ILLINET INTERLIBRARY LOAN AND RECIPROCAL BORROWING STATISTICAL SURVEY
Annual Survey of Interlibrary Loan Traffic
FY2017 (July 1, 2016 – June 30, 2017)
Completion Guidelines

INTRODUCTION

Illinois citizens are uniquely advantaged in the resource sharing model created by the Illinois State Library (ISL) and enhanced by Illinois libraries. The infrastructure upon which this system of resource sharing has been established is called ILLINET (The Illinois Library and Information Network). ILLINET is the cooperative multitype (academic, public, school, and special) network of Illinois system member libraries that work toward a common goal of optimizing resource sharing through seamless boundaries to provide quality service to the end user. Statewide resource sharing is further enhanced via the statewide delivery infrastructure, ILDS (The Illinois Library Delivery Service) and library system delivery.

PURPOSE

ISL, a division of the Illinois Office of the Secretary of State, is the agency statutorily responsible for the collection, comparison, and analysis of statewide interlibrary loan and reciprocal borrowing statistical data. Annually the Illinois State Library prepares and distributes the ILLINET Interlibrary Loan and Reciprocal Borrowing Statistical Survey in order to collect statewide interlibrary loan and reciprocal borrowing transaction data which is compared and analyzed for use within Illinois.

The monitoring of the interlibrary loan and reciprocal borrowing traffic is paramount in measuring and evaluating the: (1) number of requests initiated, filled, and unfilled; (2) methods of requesting as borrowers and lenders; (3) impact of resource sharing options [interlibrary loan and reciprocal borrowing]; (4) effectiveness of statewide delivery; (5) trends that provide directions for addressing statewide needs, initiatives, and programs; and, (6) collaborative efforts of every individual Illinois library.

AUTHORITY

23 ILAC 3030.200, a) 2) O) "The library shall complete the Illinois State Library's annual survey of interlibrary loan traffic by the specified deadline."

TIME FRAME AND DEADLINE

The survey statistics should cover fiscal year 2017 (July 1, 2016– June 30, 2017). The submission deadline is March 31, 2018.

GUIDELINES -- PRIOR TO COMPLETING THE SURVEY

1. Read through these Instructions before you begin.
2. Locate your Username and Password or contact the Illinois State Library for this information.
3. Go to <https://il.countingopinions.com>
4. Enter Username and Password and log in
5. Read the LibPAS Data Input for Interlibrary Loan Survey Instructions which outlines how to navigate the web site and how to put your statistics into the online format.
6. Print the Interlibrary Loan Worksheet to prepare your library's ILL information prior to completing the online survey. This worksheet can be used as a working draft.

GUIDELINES -- WHILE COMPLETING THE SURVEY

1. Use your ILL Worksheet to enter responses directly into the online survey.
2. Click the "Save" button (top and bottom left corner of screen) to insure your data is saved. Data will be saved as you work.
3. You may log in and out as many times as you like.
4. Click the "Next" and "Back" buttons to move through the online survey.

5. Some questions may be “grayed out” so you may not enter data. These are locked questions that will be answered by the State Data Coordinator at ISL. Updating of locked questions can take place in the “b” component of the question.
6. As an optional step, select the Verify button (upper right corner of screen) to view and resolve:
 - a. Unanswered Questions
 - i. View Required Unanswered Questions
 - ii. View All Unanswered Questions
7. Enter an estimate when an exact figure is not known.
8. If your library responds “NO” to a question, enter a reason(s) why at the prompt.
9. Fill in all answers using correct data, or an estimate.
10. The “print” tab merges the data entered in the form into a pdf format that can be printed or saved.
11. The pdf file features a “Draft” watermark until the form has been submitted.

GUIDELINES -- TO SUBMIT THE COMPLETED SURVEY

1. Once the survey has been verified, please click Submit/Lock to submit the survey.
2. Print a copy of the survey for your records. Select the Print tab on the orange navigation bar at the top to open your survey in a printable format.
3. Do not submit a print copy of the survey to ISL.

HOW TO GET HELP

1. Read through these Instructions to find answers you need
2. Read the LibPAS Data Input for Interlibrary Loan Survey Instructions which outlines how to navigate the web site and put your statistics into the online format.
3. Watch the Interlibrary Loan Survey webinar
4. While in the online survey, click on a question that has an underlined number (i.e., 1.2) to see definitions and instructions concerning that question.
5. Contact ISL or Counting Opinions staff as outlined in Contact Information for Questions below.

CONTACT INFORMATION FOR QUESTIONS

- **USERNAME/PASSWORD (ISL Staff):**
 Jill Heffernan, jheffernan@ilsos.net, 217-557-7259
 Gwen Harrison, gharrison@ilsos.net, 217-785-7334
 Patricia Burg, pburg@ilsos.net, 217-785-1168
 Toll-free 1-800-665-5576 x2
 - **CONTENT/SUBJECT MATTER (ISL Staff):**
 Gwen Harrison, gharrison@ilsos.net, 217-785-7334
 Patricia Burg, pburg@ilsos.net, 217-785-1168
 Toll-free 1-800-665-5576 x2
 - **SOFTWARE OR TECHNOLOGY ISSUES (Data Collection company):**
 Lindsay Thompson, Counting Opinions, llt@countingopinions.com
 Toll-free 1-800-521-4930
 Lindsay is available for assistance Monday through Friday, from 8 am to 6 pm Central Standard Time. Should you reach a voice mail, please leave a message so that she may call you back.
- Ryan Patrick, Counting Opinions, rpatrick@countingopinions.com
 Toll-free 1-866-850-8366
 Patrick is available for assistance Monday through Friday, from 8 am to 6 pm Central Standard Time. Should you reach a voice mail, please leave a message so that he may call you back.

GLOSSARY

CONSORTIAL INTERLIBRARY LOAN: ILL within a consortial shared catalog is facilitated by the library automation system software that authenticates patrons and ILL requests. Examples of consortial shared catalogs are SHARE, SWAN and PRAIRIECAT.

CONSORTIUM: A group of libraries formally organized to promote common interests and achieve common goals, of which interlibrary loan and resource sharing are typical examples.

DELIVERY: Library delivery in Illinois comprises the physical transportation of appropriate library materials - such as books - from one library to another in order to fulfill the request of a library user. Delivery also includes the return of the materials to the owning library or sending the item onward to meet the requests of other users. Delivery is one element of statewide resource sharing.

ILLINET: The Illinois Library and Information Network, which consists of the library systems, their full member libraries and the Illinois State Library. ILLINET is the cooperative network of multitype (academic, public, school, and special) libraries in Illinois who are certified library system members. ILLINET is coordinated by the Illinois State Library.

INTERLIBRARY LOAN: The process by which a library requests materials from, or supplies materials to, another library. Whether initiated by library staff or patron, the purpose of interlibrary loan is to obtain, upon request of a library patron, material not available in the patron's local library.

Not considered interlibrary loan:

1. Circulation of materials between a central library and its branches or within a school district.
2. Reciprocal borrowing.

NON-RETURNABLES: Materials that the supplying library does not expect to have returned. Examples of non-returnables include photocopies or facsimiles, fiche to fiche copies, print copies of microfilm, electronic full-text documents and gratis print copies of unpublished reports and/or departmental working papers.

RECIPROCAL BORROWING: The right of a person who holds a valid, in good-standing library registration card from a full member public library to borrow materials on site from other library system full member public libraries under the same conditions that the library provides those materials to its patrons, subject to reasonable restrictions approved by the library's governing board in accordance with requirements of the library system's resource sharing plan. The term "reciprocal borrowing" encompasses "Statewide Reciprocal Borrowing" and "System-wide Reciprocal Borrowing."

RETURNABLES: Materials that the supplying library expects to have returned. Examples of returnables include books, dissertations, microfilm reels, sound recordings, and audiovisual materials.

INSTRUCTIONS FOR ILL TRAFFIC SURVEY QUESTIONS

- | | | |
|-----|--------------------|---|
| 1.1 | ISL Control Number | This locked question will be answered by the State Data Coordinator.
This is the state-assigned identification code for the administrative entity. |
| 1.2 | ISL Branch Number | This locked question will be answered by the State Data Coordinator. |

		This is the state-assigned branch identification code for the administrative entity.
1.3a	Legal Name of Institution	This is the legal name of the administrative entity. Do not use acronyms. Do not abbreviate the name. If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.3b	If this locked question's answer has changed, then enter the updated answer here.	
1.4a	Mailing Address	Include street address and P.O. Box if applicable. If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.4b	If this locked question's answer has changed, then enter the updated answer here.	
1.5a	Facility City	If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.5b	If this locked question's answer has changed, then enter the updated answer here.	
1.6a	Facility Zip	This is the standard five-digit postal ZIP code for the mailing address. http://zip4.usps.com/zip4/welcome.jsp or https://tools.usps.com/go/ZipLookupAction_inpt If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.6b	If this locked question's answer has changed, then enter the updated answer here.	
1.8a	Phone (include area code)	Include area code and format the answer with numbers and hyphens only: xxx-xxx-xxxx. If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.8b	If this locked question's answer has changed, then enter the updated answer.	

1.9a	Fax (include area code)	Include area code and format the answer with numbers and hyphens only: xxx-xxx-xxxx. If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.9b	If this locked question's answer has changed, then enter the updated answer here.	
1.10a	Regional Library System	Chicago Public (CPLS) Illinois Heartland (IHLS) Reaching Across Illinois (RAILS) Not in a library system (NONE) If this locked question's answer has changed, then enter the updated answer in the "b" component for this question
1.10b	If this locked question's answer has changed, then enter the updated answer here.	
1.11a	Type of Library	Academic (ACA) Public (PUB) School Building (SCH) School District (SUP) Special (SPE) System (SYS) If this locked question's answer has changed, then enter the updated answer in the "b" component for this question.
1.11b	If this locked question's answer has changed, then enter the updated answer here.	
1.12	Name of person completing this form	
1.13	E-mail address	
2.1	Did your library REQUEST materials through interlibrary loan?	The process by which a library requests materials from, or supplies materials to, another library. Whether initiated by library staff or patron, the purpose of interlibrary loan is to obtain, upon request of a library patron, material not available in the patron's local library. Not considered Interlibrary Loan: 1. Circulation of materials between a central library and its branches or within a school district 2. Reciprocal borrowing

2.2	If NO, please explain.	Check all reasons that apply.
2.3	What was the total number of interlibrary loan requests REQUESTED by your library?	<p>The process by which a library requests materials from, or supplies materials to, another library. Whether initiated by library staff or patron, the purpose of interlibrary loan is to obtain, upon request of a library patron, material not available in the patron's local library.</p> <p>Not considered Interlibrary Loan:</p> <ol style="list-style-type: none"> 1. Circulation of materials between a central library and its branches or within a school district 2. Reciprocal borrowing
2.4 – 2.13 (Information)	Estimate if necessary, details about Returnables and Non-returnables requested via Interlibrary Loan. The auto-calculate function will perform the mathematical totals for 2.6, 2.9 through 2.12. Remember to use 0 (zero, not alpha "o") as appropriate.	
2.4	Returnables	<p>Materials that the supplying library expects to have returned.</p> <p>Examples of returnables include books, dissertations, microfilm reels, sound recordings, and audiovisual materials.</p>
2.5	Non-returnables	<p>Materials that the supplying library does not expect to have returned.</p> <p>Examples of non-returnables include photocopies or facsimiles, fiche to fiche copies, print copies of microfilm, electronic full-text documents and gratis print copies of unpublished reports and/or departmental working papers.</p>
2.6	TOTAL IN-STATE (2.4 + 2.5)	This locked question will auto calculate.
2.7	Returnables	<p>Materials that the supplying library expects to have returned.</p> <p>Examples of returnables include books, dissertations, microfilm reels, sound recordings, and audiovisual materials.</p>
2.8	Non-returnables	<p>Materials that the supplying library does not expect to have returned.</p> <p>Examples of non-returnables include photocopies or facsimiles, fiche to fiche copies, print copies of microfilm, electronic full-text documents and gratis print copies of</p>

		unpublished reports and/or departmental working papers.
2.9	TOTAL OUT-OF-STATE (2.7 + 2.8)	This locked question will auto calculate.
2.10	Total Returnables (2.4 + 2.7)	This locked question will auto calculate.
2.11	Total Non-Returnables (2.5 + 2.8)	This locked question will auto calculate.
2.12	TOTAL (2.10 + 2.11)	This locked question will auto calculate.
2.13	Comments	
3.1	Did your library SUPPLY materials through interlibrary loan?	<p>The process by which a library requests materials from, or supplies materials to, another library. Whether initiated by library staff or patron, the purpose of interlibrary loan is to obtain, upon request of a library patron, material not available in the patron's local library.</p> <p>Not considered Interlibrary Loan:</p> <ol style="list-style-type: none"> 1. Circulation of materials between a central library and its branches or within a school district 2. Reciprocal borrowing
3.2	If NO, please explain.	Check all reasons that apply.
3.3	What was the total number of interlibrary loan requests RECEIVED by your library?	<p>The process by which a library requests materials from, or supplies materials to, another library. Whether initiated by library staff or patron, the purpose of interlibrary loan is to obtain, upon request of a library patron, material not available in the patron's local library.</p> <p>Not considered Interlibrary Loan:</p> <ol style="list-style-type: none"> 1. Circulation of materials between a central library and its branches or within a school district 2. Reciprocal borrowing
3.4 – 3.13 (Information)	Estimate if necessary, details about Returnables and Non-returnables requested via Interlibrary Loan. The auto-calculate function will perform the mathematical totals for 2.6, 2.9 through 2.12. Remember to use 0 (zero, not alpha "o") as appropriate.	
3.4	Returnables.	Returnables are materials that the supplying library expects to have returned.

		Examples of returnables include books, dissertations, microfilm reels, sound recordings, and audiovisual materials.
3.5	Non-returnables	<p>Non-Returnables are materials that the supplying library does not expect to have returned.</p> <p>Examples of non-returnables include photocopies or facsimiles, fiche to fiche copies, print copies of microfilm, electronic full-text documents and gratis print copies of unpublished reports and/or departmental working papers.</p>
3.6	TOTAL IN-STATE (3.4 + 3.5)	This locked question will auto calculate.
3.7	Returnables	<p>Returnables are materials that the supplying library expects to have returned.</p> <p>Examples of returnables include books, dissertations, microfilm reels, sound recordings, and audiovisual materials.</p>
3.8	Non-returnables	<p>Non-Returnables are materials that the supplying library does not expect to have returned.</p> <p>Examples of non-returnables include photocopies or facsimiles, fiche to fiche copies, print copies of microfilm, electronic full-text documents and gratis print copies of unpublished reports and/or departmental working papers.</p>
3.9	TOTAL OUT-OF-STATE (3.7+ 3.8)	This locked question will auto calculate.
3.10	Total Returnables (3.4 + 3.7)	This locked question will auto calculate.
3.11	Total Non-Returnables (3.5 + 3.8)	This locked question will auto calculate.
3.12	TOTAL (3.10 + 3.11)	This locked question will auto calculate.
3.13	Comments	
4.1 – 4.2 (Information)	Reciprocal borrowing is made possible through cooperative arrangements among participating libraries and occurs when a patron physically goes to another library to borrow material.	
4.1	Did your library PARTICIPATE in reciprocal borrowing?	Reciprocal borrowing is the right of a person who holds a valid, in good-standing library registration card from a full member public

library to borrow materials on site from other library system full member public libraries under the same conditions that the library provides those materials to its patrons, subject to reasonable restrictions approved by the library's governing board in accordance with requirements of the library system's resource sharing plan. The term "reciprocal borrowing" encompasses "Statewide Reciprocal Borrowing" and "System-wide Reciprocal Borrowing.

4.2 If YES, report the number of materials **LOANED** via reciprocal borrowing.

4.2 If NO, please explain. Check all reasons that apply.

4.3 – 4.7 (Information) Library delivery in Illinois comprises the physical transportation of appropriate library materials - such as books - from one library to another in order to fulfill the request of a library user. Delivery also includes the return of the materials to the owning library or sending the item onward to meet the requests of other users. Delivery is one element of statewide resource sharing.

4.3 Does your library utilize Illinois library delivery services: (IHLS, RAILS, or ILDS?)

IHLS: This is the acronym for the Illinois Heartland Library System. IHLS serves Illinois libraries in the central and southern portion of the state, providing library delivery and other member services.

ILDS: This is the acronym for the Illinois Library Delivery Service. ILDS serves as the delivery backbone for the state of Illinois and connect the two library systems, IHLS and RAILS. ILDS also provides direct delivery services to approximately 145 academic institutions in the state. ILDS is managed by CARLI (Consortium of Academic and Research Libraries in Illinois) and funded by the Illinois State Library.

RAILS: This is the acronym for the Reaching Across Illinois Library System. RAILS serves Illinois libraries in the central and northern portion of the state, providing library delivery and other member services.

- 4.4 If yes, what is the current weekly frequency of your library's delivery? Check how many times weekly your library receives delivery.
- 4.5 Is this frequency enough to satisfy the needs of your patrons?
- 4.6 What is your overall satisfaction level with your delivery service?
- 4.7 Additional comments about delivery are welcomed.