

**Date:** January 12, 2009  
**To:** Resource Sharing Committee (RSC)  
**From:** Interlibrary Advisory Group (IAG)  
**RE:** Direct ISO – ILL Policy (Peer-to-Peer)

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CDL receives inquiries/requests from external institutions regarding establishing ISO-ILL peer-to-peer communications with UC's Consortial Borrowing System – Virtual Document eXchange (VDX). IAG recommends the following policy to assist CDL in responding to such inquiries. Though it was written with that purpose in mind, it can serve as a guide for the UC resource sharing community in general. This policy has no impact on the fees paid or collected in relation to Interlibrary Loan transactions.

#### Definitions and examples

*A supplier only* relationship exists when a non-UC institution responds to requests submitted by UC libraries but does not place requests on behalf of its own users through the same connection. In such connections any changes to billing procedure are incumbent on the supplier. This relationship is exemplified by our peer-to-peer connection with the National Library of Canada.

*A requesting and supplying* relationship implies that the UC libraries and the non-UC institution each process borrowing and lending transactions through the peer-to-peer connection. Such two-way connections may require changes to the way UC libraries bill for their services. They may also have significant impact on overall work load and load balancing between members. Our link with the Stanford University Libraries interlibrary loan is a successful example of such a connection. This link has been facilitated by the reciprocal agreement with Stanford, shared by all of the UC libraries.

### Recommended Direct ISO-ILL Policy

Any institution (with which UC has an existing or anticipated interlibrary loan relationship) seeking to establish peer-to-peer transactions as a *supplier only* with UC's Consortial Borrowing System – Virtual Document eXchange, may be added by CDL without consultation. Institutions seeking to establish *requesting and supplying* peer-to-peer communication with UC shall be decided on a case-by-case basis by the System-wide Operations and Planning Advisory Group (SOPAG) upon the recommendation of the Resource Sharing Committee (RSC). When making such a recommendation, RSC will take into consideration the anticipated impact on CDL.