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### Recommended Citation

Seal, Robert A. "The U.S.-Mexico Interlibrary Loan Project." *Advances in Library Resource Sharing* 2, no. 1 (1991): 165-175.

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## The U.S.-Mexico Interlibrary Loan Project

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### Introduction

Initiated in the fall of 1989, the U.S.-Mexico Interlibrary Loan Project is a cooperative effort providing for the formal exchange of books, photocopies, and microforms between libraries in the Southwest United States and Mexico City. The 25 U.S. participants are all members of the AMIGOS Bibliographic Council and are primarily academic libraries. The Mexican collaborators include six libraries at private colleges and universities and the Benjamin Franklin Library of the United States Information Service. The University Library of the University of Texas at El Paso coordinates the program, the first of its kind between the United States and its neighbor to the south.

Since 1986, the library at the University of Texas at El Paso (UTEP) has taken an active role in cooperative activities with colleagues in Mexico. The local environment contributes to the UTEP library's involvement with Mexican libraries. The largest American university on the U.S.-Mexico border, UTEP has a majority Hispanic student population, approximately 55 percent. In addition, more than 850 Mexican nationals attend the university, more than any other institution in the United States. El Paso itself has a population of more than 550,000, of which about 62 percent are Hispanic. Ciudad Juarez, El Paso's sister city across the Rio Grande, is estimated to have a million and a half residents.

Due to its geographic location and demographics, the University has long had ties with colleges and universities in Mexico. Over the years, UTEP has signed a number of "convenios," or agreements, with institutions of higher education in Mexico. These "convenios" state both parties' willingness to share resources, exchange faculty and students, and so on. One such agreement allows university students from Ciudad Juarez to use the UTEP library, to borrow books, and have database searches done. The UTEP library also routinely offers duplicate journals and books to Mexican university libraries.

### Genesis of the Interlibrary Loan Project

Early in 1988, an assistant cultural affairs officer of the U.S. Embassy in Mexico City contacted the University Library at the University of Texas at El Paso to determine if there was interest in investigating the possibility of establishing formal interlibrary loan service between the two countries. The embassy official had been approached by Mexican educators who expressed a desire to more easily acquire, that is, borrow library materials from the United States. Because of the strong ties to Mexico mentioned above, there was considerable interest in such a proposal in El Paso. As a result, two one-week consulting trips to Mexico City were arranged, one to investigate the interlibrary question and the other to present a seminar to area librarians.

The first visit occurred in May 1988 when the author met with embassy officials and the staff of the Benjamin Franklin Library. The purpose of the trip was threefold: first, to determine if interlibrary loan between the U.S. and Mexico was practical; second, to visit several libraries to become acquainted with the Mexican library environment; and third, to determine the extent of the Mexican librarians' interest in a cooperative interlibrary loan venture.

#### The Benjamin Franklin Library

Before describing the details of this visit, it is important to know something about a key player in the project, the Benjamin Franklin Library of the United States Information Service (USIS). La Biblioteca Benjamin Franklin (BBF), as it is called in Mexico, is not only the oldest of the 132 libraries in the overseas USIS system, but it is also the largest in terms of space and collections. It has a collection of more than 32,000 volumes, 350 journal subscriptions, and several daily papers from the United States. It emphasizes the social sciences, but has information from all areas. Its overall emphasis is on the United States.

The BBF is one of Mexico City's most important and best known libraries, serving the citizens of the Federal District as well as USIS and embassy staff. It offers very active and responsive reference service, handling more than 50,000 requests a year. The staff consists of 19 persons, all Mexican nationals except the Director who is an American librarian employed by the U.S. Foreign Service. The staff maintains close ties with area public, special, and academic libraries. It is for this reason that the Franklin Library and its parent USIS became involved in this project from its earliest stages, helping to plan, initiate, and support the program. The Director and Assistant Director escorted the author to local libraries during the consulting visit.

### Library Visits in Mexico City

The following Mexican libraries were visited:

1. The Benjamin Franklin Library;
2. INFOTEC, a special library supporting business and industry;
3. The Instituto Tecnológico Autónomo de México (ITAM) and the Colegio de México, two private university libraries;
4. The central library of the national university, the Universidad Nacional Autónoma de México (UNAM);
5. The Biblioteca Nacional, the national library, located on the UNAM campus and under the direction of the UNAM Library Director;
6. The Centro Universitario de Investigaciones Bibliotecológicas (CUIB), the library science research institute of UNAM; and
7. The library of the Mexico City campus of the Instituto Tecnológico y de Estudios Superiores de Monterrey (ITESM).

#### Mexican Environment and Need

The talks with the Mexican librarians were very productive and a great deal was learned relevant to a possible cooperative effort. First, and most importantly, it was determined that Mexican libraries borrow very few things from each other on interlibrary loan, let alone from the U.S. Our colleagues cited three reasons for limited interlending activity: 1) bureaucracy and red tape; 2) limited information about each other's collections; and 3) problems with the Mexican postal system. Coincidentally, the American librarians gave the same reasons for not borrowing from Mexico.

Second, because of national economic problems beginning in the mid-1980s, primarily the devaluation of the peso, Mexican librarians are experiencing great difficulty in maintaining their collections at adequate levels. Materials budgets are very limited and libraries cannot always keep up with local demand for information. Consequently, the librarians visited expressed a great deal of enthusiasm about a possible interlibrary loan program. This problem of inadequate library resources, in fact, was the reason that Mexican officials had first approached USIS about getting help from the United States.

Finally, and not of little importance, the talks with Mexican colleagues illustrated that not only were there needs which might be filled by U.S. resources, but that their libraries also had substantial collections that would be of interest to American scholars: theses and dissertations; historical materials in books and microforms; statistical data; government publications; and much more. In short, there would be ample resources for a two-way exchange.

### Obstacles and Solutions

While it was clear that a formal interlibrary loan program was highly desirable from the Mexican point of view, it was also evident that the three problems cited earlier had to be resolved. Talks with the Franklin Library staff suggested the following possible solutions. To begin with, the problem of red tape, nothing unique to Mexico, would be addressed by making procedures and guidelines as simple as possible. For example, there would be no charges, at least at first, and both sides would use the standard ALA interlibrary loan form to reduce paperwork and ensure uniformity. Most importantly, both sides would have to agree to freely lend items that they would normally loan to local borrowers.

The difficulty of identifying which library held a given book or journal, a standard part of the interlibrary loan process in this country, presented a significant barrier. First, Mexico has neither a printed national bibliography like NUC, nor a computer database such as OCLC. Second, it has no access to the OCLC database since no Mexican libraries are currently OCLC users. The proposed solution was to allow so-called "blind requests" in terms of location; the bibliographic data would still have to be verified. Further, two referral libraries would be established, one in each country, to handle incoming requests and to determine locations. The U.S. referral center would search OCLC, and the Mexican referral library would consult union lists of periodicals, call the other libraries by telephone, and use any other method required to find a needed item.

The problem of the Mexican postal service, which initially seemed formidable, was circumvented relatively easily when USIS suggested the possibility of using the U.S. Embassy courier to transport library materials between Mexico and the United States. This messenger travels several times a week between Mexico City and Laredo, Texas, and provides very reliable movement of goods and mail. Telefacsimile would be used to send the requests themselves and an occasional rush photocopy.

### The Proposal

Following the visit to Mexico, the author returned to El Paso to begin to write a formal proposal for a pilot project to submit to USIS for its consideration. First, however, it was necessary to interest several American libraries in the project. A meeting was held at the ALA summer meeting in New Orleans in July with representatives from several libraries from the AMIGOS Bibliographic Council to explain the proposal and seek support. AMIGOS officials had expressed a great deal of interest in the project early on and offered some financial support if member libraries would get involved. In the end, 21 AMIGOS academic libraries agreed to participate in a test project.

On July 7, 1988, a proposal for a year-long pilot project for calendar 1989 was sent to USIS for its review and approval. Briefly, the stated purpose of the project was to determine the feasibility and usefulness of a formal program of interlibrary loan service between academic libraries in Mexico and the United States. The proposal cited three advantages for such a program:

1. It would facilitate the exchange of scholarly information between the United States and Mexico.
2. It would promote and enhance scholarly research on both sides of the border.
3. It would improve ties between the library and research communities in both countries.

The test program had the following specific objectives:

- to evaluate the effectiveness of the program in terms of cost-benefit, turnaround time, and ability to supply needed library materials;
- to determine the usefulness of the program to scholars;
- to identify the types of library materials most likely to be requested;
- to determine the level of interlibrary loan traffic between the two countries;
- to identify operational problems;
- to refine procedures for handling requests; and
- to determine the annual costs of the program.

During the test period, books and microforms would be loaned to institutions for no less than four weeks from the time the item arrived. The initial recommendation was for restricted access, that is, books and

microforms sent to Mexico would have to be used in the Benjamin Franklin Library, and items sent to the U.S. would have to be used in the requesting institution's library. This was later changed to allow in-house use in the Mexican libraries themselves rather than at the Franklin Library.

Photocopies requested by Mexican libraries would be sent to the Benjamin Franklin Library where they would be picked up by the borrower or a courier from the requesting institution. Photocopies requested by U.S. borrowers would be mailed by the BBF directly to the requesting library.

During the pilot project, materials loaned and borrowed would be restricted to those disciplines in the social sciences (including business) and humanities. Requests would not be accepted for science, technology, or medical materials. This was done to limit the scope of the project and make it more manageable.

The UTEP Library would serve as the referral center for requests coming to the U.S. from Mexico, while the Benjamin Franklin Library was designated to handle incoming requests from the U.S. The overall program would be jointly administered by UTEP and the BBF.

As noted earlier, it was suggested that all materials be transported by the U.S. Embassy courier which regularly delivers mail between Laredo, Texas, and Mexico City. Interlibrary loan requests for Mexico would be mailed (using the USIS post office box in Laredo) or faxed directly to the BBF. Requests to the United States would be forwarded to the Library at the University of Texas at El Paso by the BBF using mail or telefacsimile.

The project would be governed overall by the provisions of the "National Interlibrary Loan Code" published by ALA in 1980, and the standard ALA interlibrary loan request form would be utilized. The original proposal suggested charging Mexican libraries a small administrative fee to help the Franklin Library defray costs for processing requests. The details of this arrangement were to be worked out prior to implementation. A system of coupons was proposed to facilitate bookkeeping and minimize problems with the exchange of foreign currency.

If the pilot project was successful, the intent was to make it a permanent service with the possibility of expanding the scope to include additional libraries in both countries, and perhaps loaning materials in the sciences and engineering.

#### Further Developments

In November 1988 the author returned to Mexico City for a week to present a workshop and to meet with USIS officials to discuss further plans for the pilot project. Over the summer, the director of the Franklin Library was reassigned to Germany and a new person was on board. The USIS and Embassy personnel had also changed. (Such changes are common in the

foreign service.) Discussions of the project therefore continued with new staff with different viewpoints.

Because of limited staffing and tight budgets, the new director of the Franklin Library felt the Mexicans should take a larger role in the administration of the project. After all, it was they who would benefit the most from the project. Taking the BBF out of the loop would also eliminate the need to charge for administrative costs, red tape that all could do without. Taking these ideas into account, a revised proposal and report was submitted to USIS on November 28, 1988.

For a variety of reasons, the proposal was not acted upon or discussed further until May of 1989 in Saltillo, Coahuila, Mexico, at the annual meeting of AMBAC (Asociacion Mexicana de Bibliotecarios), the Mexican version of ALA. Talks with the Franklin librarian in Saltillo ironed out the final details necessary to launch the pilot project. It was agreed that although the Mexican librarians would take more responsibility for managing their end of the program, the Franklin Library could still serve as a shipping point and the Embassy Courier was available as planned earlier.

A six-month test was suggested instead of a year, September 1989 through February 1990. Under the new plan, the Instituto Tecnológico Autónomo de México (ITAM) and UTEP would be the referral libraries as well as project coordinators, along with the Franklin Library. To simplify matters further, it was decided not to charge for reasonable amounts of photocopy. The project began unofficially in the summer of 1989, formally September 1.

#### How the Program Works

Briefly, the service works as follows. A patron in Mexico City makes a request at his or her library for a U.S. imprint, journal article, or item on microfilm. The library staff member fills out the standard ALA interlibrary loan form and faxes it to the interlibrary loan department at the University of Texas at El Paso.

The UTEP Library first tries to verify the request on OCLC, noting locations and paying special attention to see if UTEP's symbol, TXU, appears. The ILL staff attaches printouts of the OCLC screens or other verification source to the request. Items which OCLC says UTEP owns are turned over to a student assistant to search the online catalog, serials listing, card catalog, and the shelves. If the item is on the shelf, a photocopy is made or the volume pulled for shipping. The material is then mailed to the Franklin Library in Mexico City for pick-up by the requesting library. Only occasionally will a photocopy be faxed to Mexico, usually when the requesting library has a rush need.

If UTEP doesn't own the item in question, then the request is mailed to one of the 25 AMIGOS libraries participating in the program. If that library can't provide the item, it informs UTEP so the request can be sent to another participating library. If the request cannot be filled at all, the Amigos library returns the request to the originating Mexican library with a list of non-AMIGOS locations obtained from OCLC so that the Mexican library staff can try on their own, if they wish, to borrow the item in some other manner.

Early on, the project coordinators tried to find a way to utilize the OCLC interlibrary loan subsystem to facilitate handling and record keeping. Unfortunately, none of the Mexican libraries is an OCLC user/member. Furthermore, as for the referral library, there was no way for the University of Texas at El Paso to update the online request file status since once the request left the UTEP interlibrary loan department, there was no way to know if or when an item was shipped to Mexico. Therefore, the ALA form was selected as a simple and effective, though slower, alternative to OCLC. However, other steps are taken by the UTEP interlibrary loan department to speed up the process through verification, pre-printed mailing labels, and a tear-off form for shipping to Mexico.

Upon receipt of the materials, the Franklin Library calls the requesting library for pick-up. When patrons are finished, books and microforms are returned to the Franklin for shipping back to the States. The entire process is simple, relatively fast, and efficient. To date, not a single item loaned to Mexico has been lost and all have been returned in good physical condition.

Requests from the U.S. to Mexico are handled in a similar manner by the Library of the Instituto Tecnológico Autónomo de México, only in reverse. After materials are located in Mexico City, they are delivered to the Franklin Library where staff mail them to the U.S.

### Evaluation

The project was evaluated after six months to determine if it should continue. A formal evaluation was not undertaken, but instead informal discussions took place with colleagues in the U.S. and Mexico. A face-to-face discussion between the author and the Mexican librarians took place on March 26, 1990, in Mexico City at the Franklin Library. The Mexicans expressed great satisfaction with the program, stating that it had been a tremendous help to them, providing their faculty and researchers with much-needed information from the U.S. and they requested a continuance of the project. They were told that an indefinite extension would be recommended to the participating AMIGOS libraries which would also be asked to begin loaning materials in the sciences and technology, a high priority with the Mexican librarians.

While the librarians in Mexico City were very pleased to be able to obtain materials from the U.S., they had a serious concern. Specifically, while they sent many requests to the U.S., they received very few from the American libraries. They were willing and able to reciprocate and wanted to know why the Americans were not requesting materials from their collections. While a specific response was difficult, there were three possible answers. First, the U.S. libraries have very limited knowledge regarding Mexican holdings and simply do not know what is available. Second, there exist very strong collections of Latin American materials in the U.S., and the tendency is to request things first within our own borders. Third, there simply may not be much demand at present for Mexican books and journals among U.S. researchers.

Five weeks later in May 1990, the AMIGOS libraries involved in the project met at the spring meeting of the network in Dallas. The purpose was to evaluate the project, review statistics, and most important, make a decision about continuing the program. The AMIGOS participants enthusiastically approved making the program a semi-permanent service, as well as approving the Mexicans' request for the loan of science and technology materials. Additional libraries were invited to join the effort and several have done so since that meeting.

Activity on the U.S. side has been brisk since the program was initiated. In the first 12 months, the UTEP Library received and processed 871 inter-library loan requests from Mexico. Activity was relatively slow at first, but increased significantly as time went on. For example, in the first four months an average of 28 requests per month was received. In the next eight months the monthly average jumped to 95. The peak period for the first year was April 1990 with 175 requests processed.

The first three months of the second year, September through November 1990, saw even greater activity with 476 requests received from Mexico, an average of 159 per month. Considering variations due to vacation periods and so on, as many as 1,500 requests are expected for the 1990/91 academic year.

Of the 871 requests handled in 1989/90, one-third were filled by UTEP, 52 percent were filled by the other AMIGOS libraries, and 15 percent were unfilled. Many of the unfilled requests could likely be satisfied by libraries outside AMIGOS, but at present no arrangements have been made to forward the items beyond our network.

On the other hand, activity in terms of requests sent from the U.S. to Mexico, as mentioned above, has been light. A mere 24 requests were sent to Mexico by the AMIGOS libraries in the first 12 months. Of these, seven were filled. However, activity in the fall of 1990 indicated a substantial upturn in requests headed south of the border. The period from September to December 1990 equaled the previous 12 months with 24 requests, 16 in

December. Both sides are encouraged by this increase, and the number is likely to continue to rise steadily as time goes on.

### Summary and Conclusion

Looking back on the first year and three months of operation, the program has been an unqualified success. There have been relatively few problems, mostly procedural snags which were cleared up relatively easily. The AMIGOS libraries readily embraced the project, doing their best to respond positively and quickly to requests from their colleagues in Mexico. The Mexican libraries have responded in kind. The UTEP interlibrary loan staff has given the project high priority and through their hard work and dedication have made it a success. It has been a team effort all around, a highly successful cooperative venture.

In conclusion, the U.S.-Mexico interlibrary loan project met its original goals of facilitating the exchange of scholarly information; promoting and enhancing scholarly research; and improving ties between the library and research communities in the two countries. Through these efforts, it has been shown that international borders, cultural differences, and bureaucracy need not be barriers to the sharing of resources and to providing access to information.

## Appendix: List of Participating Institutions

### A. Original AMIGOS participants

1. Abilene Christian University
2. Arizona State University
3. Baylor University
4. Lamar University
5. Laredo State University
6. New Mexico State University
7. Southern Methodist University
8. Texas A & M University
9. Texas Southmost College
10. Texas Tech University
11. Trinity University
12. University of Arizona
13. University of Arkansas
14. University of Houston
15. University of New Mexico
16. University of Texas at Arlington
17. University of Texas at Austin
18. University of Texas at Dallas
19. University of Texas at El Paso
20. University of Texas at San Antonio
21. University of Tulsa

### B. New AMIGOS Participants (joined in 1990)

1. American Graduate School of International Management (Phoenix, AZ)
2. Corpus Christi State University
3. University of Texas, Pan American
4. Tucson Public Library

### C. Original Mexico City Participants

1. Benjamin Franklin Library, USIS
2. Instituto Tecnológico Autónomo de México
3. Instituto Tecnológico y de Estudios Superiores de Monterrey (Mexico City campus)
4. Universidad Iberoamericana
5. Universidad de las Américas (Puebla)
6. Universidad Internacional
7. Colegio de México