

Checklist: Fine-tune your Policies and Deflections

Part 1 of the OCLC Resource Sharing Workshop Series

Policies Directory – Schedule tab

Operating Hours

- List your department's regular operating hours
- If you have multiple locations, you can have multiple entries

Closures

- If you know about any closures in advance (e.g., holiday breaks), set them up
- Create start and end dates for the closure and a closure type
- Be sure to set yourself to OCLC Supplier? **No** during these closures
- Include any notes if necessary (but remember the notes are informational only)

Policies Directory – Contacts tab

- Be sure your contact information is up to date
- You can create or edit separate entries for borrowing, lending, billing, and shipping contacts if needed
- Delete any out-of-date information (e.g., Ariel address)

Policies Directory – Policies tab

Policies

- Remember, these are **informational only**
- Do you have a copy policy? Is it up to date? Do you list what you charge?
- Do you have a loan policy? Is it up to date? Do you list what you charge?
- Does the loan period listed in your loan policy match what you apply in practice (with constant data)?

Deflections

- Do you have deflections set up to match your lending policies? (e.g., you don't lend AV, you charge a fee to supply requests)
- Can you read your policies in plain English and know what they are doing?
- Make sure your policies are simple and do not combine too many criteria; remember, within one policy, the criteria are ANDed together. Between policies, OR is used.

Assessing your Deflections

OCLC Usage Statistics (www.stats.oclc.org)

- Review the **Resource Sharing Lender Reasons For No Report**
- Access this report monthly
- Look for entries about deflections
- Did you intend to deflect the requests that were deflected?
- Do you see Policy Problem as a common Reason For NO? If so, you may need a new deflection policy
- Based on information you see in this report, review your deflection policies in Policies Directory