

Collection Sharing Best Practices, from a SHARES Point of View

This document is a work-in-progress. Send ideas, comments, and suggestions to massied@oclc.org.

SHARES Statement of Purpose: SHARES is the resource sharing arm of the OCLC Research Partnership. SHARES supports proactive collaboration among its member libraries. This collaboration results in generous resource sharing, primarily through interlibrary loan of and onsite access to the participating libraries' strong, rich, diverse, and often unique collections, regardless of rarity or format. SHARES membership and its Executive Group explore and recommend current and innovative technologies, policies, and practices to facilitate this enhanced sharing.

Borrowing (page 1 of 2)

Principle	Best – General	Best Plus – SHARES	The Worst
Make requesting as easy and accessible as possible for your patrons.	Provide online requesting to your patrons.	Maintain a web page which guides your local patrons through the online requesting process and makes clear your policies.	Paper request forms and no easily accessible FAQs, guides or policy statements.
		Utilize workflows which expedite getting needed items (e.g. Direct Request).	
		Request regardless of format or collection - your SHARES colleagues may supply!	Cancelling a request due to format without even requesting from or contacting other libraries to see if alternative possibilities exist.
Make filling the request as easy and straightforward as possible, so that the supplying library can fill it in a timely fashion.	Perform regular status checks on outstanding requests.	Request scan resends or loan status/tracking checks from lenders in a timely fashion.	No news is good news.
	Use the correct OCLC record for the title/edition needed when requesting.	Make certain that enough information is present in the request to allow the lending library to locate and supply the needed item.	Requesting blindly or with information that is so incomplete that the supplying library cannot reasonably fill without having to conditional the borrowing institution.
While borrowed returnables are in your possession, treat them even better than you would treat your own materials.	Make certain all loans are returned in a timely fashion.	Make every effort to retrieve extremely overdue items from patrons. Most libraries would rather have their book back than have to issue a replacement invoice.	
		If a request has multiple items, send back to the lender only when all items have been returned by the patron.	

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Borrowing (page 2 of 2)

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While borrowed returnables are in your possession, treat them even better than you would treat your own materials.	Enforce any restrictions, such as Library Use Only, as designated by the lender.	Check incoming loans for any pre-existing damage, underlining, missing CDs, etc. When any problems are found add a note to the request record.	
	Request renewals in a timely fashion	Communicate directly with lender regarding renewals in exceptional cases (multiple renewals, extended renewals for medical or family emergencies).	Ignoring recall notices and not paying invoices in a timely manner. Returning a loan to the wrong address (when the lender has multiple addresses).

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Lending

Principle	Best – General	Best Plus – SHARES	The Worst
Cultivate generous ILL lending partners by being a generous ILL lending partner.	Make your default starting point be "How can I get to yes?" rather than "Is there any reason for saying no to this requesting library?"	Consider every single request on its own merits without applying blanket restrictions, and make exceptions to local policy when possible.	Setting up lending policies strictly for your own convenience.
Make your default starting point be "How can I get to yes?" rather than "Is there any reason for saying no to this requesting library?"	Advocate with your own administrators to consider lending non-traditional formats and special materials, as it makes it easier to borrow such things for your own constituents.	Have regular conversations with colleagues in other departments so you already know under what circumstances you can lend special classes of material before the request even arrives.	Lending only those materials one might expect to get via "traditional" ILL.
Consider every single request on its own merits without applying blanket restrictions, and make exceptions to local policy when possible.	Go the extra mile if on the first try you can't locate an item that is supposed to be available, especially if you're the last lender in the string.	If you can't supply the item as requested, and there don't appear to be other SHARES options for the borrower, contact the borrowing institution to see if the request might be satisfied by some other means, such as copying a section rather than lending the original.	Looking for any reason to say "no," since lending does not benefit your library.

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Packing and Shipping

Principle	Best – General	Best Plus – SHARES	The Worst
Always follow lender's shipping/packing guidelines.	If a request has multiple items, send them back to the lender all together.	An insured courier must be used for returnable material.	Packing peanuts.
Choose your packaging materials based on value, condition, and physical characteristics of item being shipped.	Do not overuse boxes/bags.	Odyssey/Article Exchange are the preferred methods of delivery for photocopies.	Fiber Bags of Death
Reduce your carbon footprint: attempt to borrow closest available copy.	Replace packing peanuts with more eco-friendly, less messy crumpled paper.	Expedited delivery is available at cost to borrower.	Hidden materials (i.e. single microfiche floating in giant box with other items).
	Bundle return shipments when possible.	Ship museum library materials in a box.	Overused shipping materials.
	Larger, fragile, or expensive items may require more effective packaging and perhaps even extra insurance .	Refer problems directly to the supervisor of ILL operations. The next level would be the OCLC SHARES Coordinator, if necessary.	
	Negotiate contracts with couriers, if possible, to find the best rate .		
	Make sure each item is secure and unable to shift within the shipping container .		
Clearly indicate in the Policy Directory which shipping methods you use.			

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International Packing and Shipping

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Always follow the lender's shipping/packing guidelines.	Use precise, up-to-date language for customs forms.	If a shipment will exceed the \$30 SHARES International fee, contact the borrower to be sure they will still want it and/or to negotiate additional fees.	Slow boat.
Choose your packaging materials based on value, condition, and physical characteristics of the item being shipped.	Consider the length of shipping time when assigning the due date.	Use airmail.	
Reduce your carbon footprint: attempt to borrow the closest available copy.	Clearly indicate in the Policy Directory which shipping methods you use.		