

Lending Requests: Physical Loans Customizable Workflow Template

OCLC SHARES Sharing Special Collections through Interlibrary Loan

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Instructions: Consult with locally determined individuals (e.g., interlibrary loan, special collections, archives, and/or digitization staff) to create a workflow for your institution. Insert the name of a unit or individual(s) to perform each step. Add more steps and/or details as appropriate.

Lending Requests: Physical Loans

Request Handling

1. Request arrives via interlibrary loan (ILL).
2. When an item is held in a special collection, [ILL staff or insert name] sends a conditional response to notify the requesting library that:
 - a. It is a special collections item
 - b. They must exhaust other domestic lenders for a circulating copy in a general collection
 - c. They may ask for a special collections loan consideration as a last resort if they put the potential lender at least three times in the lending string of a new ILL request to give sufficient time for local review.

Sample ILL system conditional message:

Special collection item: Exhaust other lenders first. If not filled elsewhere, re-request with our symbol 3x in string and include borrowing note requesting consideration for spec coll item; we will then seek curator approval to lend.

3. If loan request is received for a public domain work not online (e.g., in Hathi, Google Books, Internet Archive, etc.), it may be considered for scanning/digitization in lieu of a loan if possible. See “Digitizing Entire Works” workflow.
4. If the requesting library exhausts other domestic lenders and re-requests asking for special collection loan consideration, [ILL staff or insert name] consults [Special collections curator/designee or insert name] asking for loan consideration. [ILL staff or

insert name] should provide the item's citation, shelf location, and call number as well as name of the requesting library. If desired, ask the requesting library to provide a completed Facility Trust Checklist to assist the loan approval determination.

Approval process

5. [Insert name of unit or individual] retrieves item from shelf for potential loan review.
6. [Insert name of unit or individual] reviews item for lendability by considering item's condition, age, rarity, value, and borrower's location. A determination is made whether or not the loan request can be filled or an alternative (e.g., whole item digitization or scanning small sections) can be offered.
 - a. If loan is **not permitted** and/or digitization or small section scanning is offered instead, [ILL staff or insert name] will relay information to the requesting library.
 - b. If loan is **permitted**, the following **minimum standard loan conditions** apply:
 1. Item must be used in a special collections reading room or equivalent supervised space.
 2. Item must be stored in a secure place when not in use.
 3. Photocopying/scanning of loaned material by library staff or photography by user, in accordance with copyright law, is permitted, unless explicit instructions to the contrary are specified by the lending library's special collections staff.
 4. Loan period should be at least 30 days.
 5. No adhesive label, tape, or sticky note will be applied to item.
 6. The borrowing library's rules for usage in their special collections reading room will be followed unless the lending library's special collections gives specific instructions for a particular piece as a condition of the loan.
 7. Item must be returned via insured, trackable commercial courier.
 8. Item must be carefully packaged in its own box separate from general circulating collection items and include paperwork identifying it as a special collections item requiring special care and processing. See Packaging and Shipping Instructions for Special Collections Items.
7. [Special collections curator/designee or insert name] notifies the [ILL staff or insert name] of any usage or shipping restrictions particular to a specific piece so that these may be relayed to the requesting OCLC SHARES library via a conditional message for agreement before any item is sent.
8. [Special collections curator/designee or insert name] should also specify any required insurance value for shipping.
9. If the OCLC SHARES requesting library accepts the conditions or if no additional restrictions beyond the standard loan conditions apply, [Insert name of unit or individual] updates the local catalog and/or the local special collections request management system, and [ILL staff or insert name] will update their ILL system, to indicate the item is checked out and being shipped.

10. [ILL staff or insert name] prepares ILL paperwork for item that includes standard or item-specific usage/shipping restrictions as well as a return shipping address label or information.

Shipping

11. [Insert name of unit or individual] prepares a condition report for the special collections item at the time of packaging and denotes insurance value for borrowing library's return shipping.
12. [Insert name of unit or individual] packages item. See the [Packaging and Shipping Instructions for Special Collections Items](#) for specific instructions.
13. [Insert name of unit or individual] provides tracking information to borrowing library upon request.

Materials Returned

14. Upon return, [Insert name of unit or individual] unpacks item, compares item to initial condition report, and inspects material for any damage. If damage is found, [ILL staff or insert name] notifies the borrowing library's ILL staff of the irregularity discovered as well as any replacement, repair, or other appropriate compensation required.
15. [Insert name of unit or individual] checks in or updates the local catalog, ILL system, and/or any special collections request management system to complete the request.
16. [Insert name of unit or individual] returns item to shelf.