

Packaging and Shipping 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, etc.) 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.

Packaging and Shipping

1. [Insert name of unit or individual], who is trained to manage interlibrary loan special collections requests, must be on hand to pack material.
2. [Insert name of unit or individual] prepares a condition report for the special collections item at the time of packaging.
3. [Insert name of unit or individual] includes a copy of the condition report, usage/shipping restrictions, complete return shipping address information, and appropriate interlibrary loan (ILL) paperwork with all loans.

Packaging instructions for lending institutions

1. Wrap item in acid-free, lignin-free tissue paper as if it were a present.
 - a. Never use colored or dyed paper.
 - b. Never use tape or other adhesives on the paper wrapping or the item.
2. Enclose item in a manner that will protect against moisture.
3. Wrap item in two layers of bubble wrap with no tape touching the underlying paper wrap.
4. Pack enclosed item in its own box.
 - a. Never use mailing envelopes, jiffy bags, or padded mailers for special collections items.
 - b. Pack to allow a minimum of two inches of fill on all sides.

5. Seal all box seams with tape.
6. On the outside of the box or label, include a note that the item must be opened by borrowing institution's locally determined individual(s) (e.g., ILL, special collections, archives, and/or digitization staff).

Shipping instructions

1. [Insert name of unit or individual] packages and ships the item with any additional instructions.
2. Ship materials using a carrier that offers tracking and insurance, such as FedEx, UPS, or DHL.
3. Ship materials early in the work week to avoid having materials spend time in transit or in mail holding areas on weekends. Shipping should not occur if there are outside mitigating factors that could delay package delivery (e.g., holidays, bad weather at lending, or borrowing library's point of origin).

Unpacking received materials

1. [Insert name of unit or individual] assesses the condition of packages before unpacking.
2. [Insert name of unit or individual] evaluates the item's condition, compares to any condition report sent by lender, and contacts lender's ILL staff if any discrepancies are found.
3. Save packing materials for item's return only if they are in suitable condition for reuse.
4. If package appears damaged, [Insert name of unit or individual]:
 - a. Documents exterior of package before unpacking
 - b. Documents any damage to the item
 - c. Contacts lending library immediately

Packaging instructions for borrowing institutions

1. Packing of borrowed materials must be done by [Insert name of unit or individual].
2. Pack returning item according to any instructions provided by the lending library. If no special instructions are given, use the guidelines in "Packaging instructions for lending institutions."
3. Ship materials using a carrier that offers tracking and insurance, such as FedEx, UPS, or DHL.
4. Insure package for value denoted by lender.