

## **BLC Resource Sharing Best Practices (Revised November, 2015)**

Document's mission: to get materials into the hands of our user community as quickly and most cost-effectively as possible. This document is meant to facilitate this process across all resource sharing systems, e.g. Clio, ILLiad, Navigator (NRE), Rapid, and WorldShare.

**Your Institution:** \_\_\_\_\_

### **General Best Practices**

- Borrowing and Lending have equal importance
- Communicate our resource sharing standards to our staff and student workers
- Include appropriate paperwork with all materials
- Process new requests throughout the business day
- Process incoming mail daily (business hours)
- Communicate about requests through the source system (e.g. NRE) and follow up by email or phone when necessary
- Follow up on special messages and system alerts weekly (e.g. flagged requests, connection manager errors)
- The borrowing library assumes responsibility for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library. This includes all material shipped directly to and/or returned by the user. If damage or loss occurs, the borrowing library must notify the lending library. The lending library may then assess value based on its replacement policy and bill the borrowing library. It is the responsibility of the borrowing library to assess fees to the patron and/or rescind borrowing privileges from the patron in accordance with its own regulations.
- View the ILLiad training videos to improve knowledge and skills
- Checking stacks by students and staff, but adhere to the 24 hours turn around on requests
- Borrowers will respect and abide by the lending library's local policies as they pertain to the loan as noted on the lending paperwork

### **Borrowing Best Practices**

- Do not limit number of requests from users, but reserve the right to prioritize requests
- Ensure that expired patrons do not place requests

### **Lending Best Practices**

- Use reasons for "No" when you can't fill a request
- Send "Conditional" if you intend to fill the request but need more information or additional time to fill
- Do not substitute a different edition without first sending a Conditional message to the Borrowing Library
- Use system settings to go to non-lending status; do not notify the listserv

### **Non-Returnables Best Practices**

- Use the borrower's preferred method of delivery (Odyssey, RapidX)
- Send Rapid documents via RapidX or Odyssey only
- Use latest version of Odyssey to ensure the exchanging of color PDFs
- Use document quality of 300 dpi
- Include supplemental information whenever possible (plates, charts, footnotes, endnotes, etc.)
- Scan with consistent page size and orientation
- Scan in color when requested
- Respond to resend requests within 12 hours
- Provide native, digital PDF (preferably in color) before paper scans
- Update ILL holdings on the same schedule you update your local holdings; at least semi-annually
- Make BLC libraries trusted lenders

### **Returnables Best Practices**

- Deliver returnables by UPS 2<sup>nd</sup> day Air; in MA return in Regional Delivery (if you have delivery at least 4 x week)
- Generously lend books and media
- Arrange for daily UPS pickup and delivery
- Use UPS supplies for shipping whenever possible
- Recall only for reserve needs
- Return recalled material via UPS 2<sup>nd</sup> Day Air

### **ILLiad Best Practices**

- Maintain multiple address sites in the ILLiad Lender Address Form when the institution has multiple libraries doing ILL lending
- Check for and resolve problems in the ILLiad Request Sent queue promptly, at least once a week
- Utilize ILLiad Custom Holdings
- Set up and utilize ILLiad Direct Request for BLC libraries

### **NRE Best Practices**

- Keep your calendar current in the NRE (NRE>Locations>Edit Own)
- Review and keep current your NRE shelf locations in the WorldCat Local Self Configuration module
- Set yourself to last resort lending as a true last resort
- BLC libraries should be priority lenders in NRE, except when staffing issues may prevent it

### **Rapid Best Practices**

- Special use items are permitted special due dates

- ❑ Borrowers will respect and abide by the lending library's loan period policies
- ❑ Renewals are not permitted due to current system limitations (However, if Rapid can find a way to override this limitation the group endorses granting renewals on a case by case basis.)
- ❑ In regard to multi-volume sets, the borrower may request more than one volume per request
- ❑ Interlibrary Loan departments should always approach one another to resolve minor issues. Repeated attempts at resolution without solution may denote a major Issue (see Section IV of RapidR policy) and can be referred to the Rapid team. Serious problems include: lack of response to repeated attempts at solution, lack of lending participation, or consistently failing to handle requests within the established turnaround time guidelines. These issues are dealt with by written notice, and failure to correct deficiencies will result in termination of service.

### Recommendations

- ❑ Implement Rapid book chapter lending and Rapid Returnables
- ❑ Upgrade to latest version of ILLiad
- ❑ When requested, try to supply searchable or text-to-speech format
- ❑ When negotiating licensing, remove language that restricts interlibrary loan and document delivery as per the *Liblicense* Model License Agreement (<http://liblicense.crl.edu/licensing-information/model-license/>)
- ❑ Consider making exceptions to lend items in generally non-circulating collections (e.g. microform, dissertations, theses, etc.) to a fellow BLC library
- ❑ Use the same loan periods for books and media in ILLiad that are used in the NRE (70 day institutional loan for books; 14 day institutional loan for media).