

Shared Collections Facility Policies and Workflows

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Shared Collections Facility Planning Guide

What types of materials can be stored?

The WRLC Shared Collections Facility is optimized for bound volumes, which are stored in acid-free cardboard trays, and archival boxes, which fit in the shelving system. Many other types of material can be accommodated (e.g. microfoms, audio-visual materials); consultation with WRLC staff prior to sending other formats is required. All materials should be free of mold, pests and any other substances which might negatively impact other materials in the facility.

PLEASE NOTE: WRLC does not separately insure stored items unless special arrangements are made. The owning library should make sure that its existing insurance policies cover materials stored offsite.

Cost

The owning library pays for the cost of accessioning items into the storage facility. The charge covers the cost of unpacking, sorting, data entry, and shelving the items. There is no additional cost for storage or for retrieval/delivery of library materials: those services are covered by the library's WRLC membership fees.

Condition and packing

Volumes should be clean and free of loose dust and dirt, to avoid bringing contaminants into the storage facility. Items should be transferred to WRLC in boxes. Boxes used for transport should be sturdy and in good condition, and packed so that no box weighs more than 50 lbs.

Staff at WRLC will sort the volumes by size to fit into the standardized trays (provided by WRLC) which are used at the storage facility. WRLC is not equipped to store palletized shipments.

Catalog records and inventory control

For each volume, the library must provide a bibliographic record and item record in the WRLC Catalog, which serves as the inventory control system for these items. WRLC will add the storage location to the existing WRLC record during accessioning. The WRLC Database Standards Policy defines the required amount of cataloging information for various kinds of WRLC records. When necessary, special arrangements can be made for storage facility staff to create the necessary cataloging records (at an additional cost).

How much can be transferred to storage, and when?

WRLC will work with the owning library to determine the optimum schedule of shipments and processing at WRLC. The schedule depends on the owning library's priorities and ability to prepare material for storage and on WRLC's existing processing commitments. Since WRLC uses primarily contract staff to process storage items, and the owning library pays for the processing, WRLC can increase staffing when feasible and necessary to process very large quantities.

WRLC's processing facility is designed to handle a steady throughput of items from the unloading area to the storage shelves. WRLC can accept large bulk shipments on occasion, but smaller periodic shipments are preferred. The owning library pays for shipment. If the library chooses to use its own carrier, inside delivery must be specified.

Shared Collections Facility Policies

Use of Shared Collections Facility

1. WRLC members share the cost of operating the offsite storage facility through the annual member fees, which cover the cost of building utilities and maintenance, and staff to perform retrieval and delivery of requested items. There is no additional charge to member libraries for storage, retrieval, or delivery of library materials. Library materials ("WRLC items") are those items which are described in the shared online catalog AND are available for use by patrons of other WRLC libraries.
2. To qualify for "free" storage, items must have bibliographic and holdings records in the WRLC catalog which adhere to the then-current policy on WRLC Data Base Standards for Bibliographic and Holdings Data. Libraries which store uncataloged materials or materials which are not available for use by other WRLC libraries will pay for such storage on a cost-recovery basis (See "Storage of Nonlibrary items").
3. Member institutions pay the costs of accessioning items into the storage facility (sorting, shelving, adding the actual shelf location to the WRLC record). These are one-time costs for each volume or item.
4. Originally, use of the storage facility was "first-come, first-served", with no upper limit or minimum quota for individual member libraries. Beginning in 2008, member libraries have been allocated a certain percentage of available space and may send volumes up to the maximum allocated.

Shared copy policy

Each library may use its own criteria to select materials for WRLC storage. The goal is to free campus library space as determined by each institution. However, materials transferred to the offsite storage facility are subject to this shared copy policy adopted by the WRLC Library Directors Council on January 18, 2008. This policy is intended to limit duplication of materials housed at the shared facility.

Background

WRLC's Shared Collections Facility capacity is finite, even after any potential expansion. The remaining capacity should be prioritized for unique materials by restricting duplicate volumes. Member libraries must be able to rely on permanent access to already-stored materials so they may deaccession duplicate copies to free space on campus.

Policy

Transfer of materials to the WRLC library repository will be governed by the following policy agreed among the WRLC member libraries:

1. No print serial volume may be added to the repository if it duplicates a print serial volume already stored.
2. No print monograph volume may be added if its addition would result in more than two copies of the same edition held in the repository. Two copies of a specific edition of a monograph will be permitted in the WRLC repository collection to increase the likelihood of permanent access.
3. No nonprint media item may be added if it duplicates an item of the same format that is already stored.
4. In order to guarantee permanent access to stored materials, WRLC member libraries will commit to provide perpetual access for other WRLC members to the intellectual content of all stored volumes, and to preserve in a safe and secure environment any such volumes that are removed. To this end, should member institutions decide to withdraw "last copy" volumes from the shared facility, they agree to the following:
 - materials will be stored in secure storage environments
 - materials covered under this policy will be stored in facilities with appropriate climate control for long-term preservation of the materials
 - use of materials covered under this policy will be supervised.
5. For volumes that are already shelved in the WRLC facility when this policy becomes effective, libraries may identify volumes or categories of volumes that will be excluded from the perpetual access requirement.
6. George Mason University and the University of the District of Columbia will be exempt from this policy because laws and regulations affecting public institutions and the disposal of public property limit their ability to participate. These two institutions will be allowed to store volumes which are duplicates and which would otherwise be prohibited. These two institutions will not be required to guarantee permanent access to volumes which they store at WRLC.

Operational agreements

1. Duplicate volumes already stored at the WRLC Shared Collections Facility will not be removed, because removing, inspecting, selecting, and reclaiming the space would not be cost effective.
2. Newly-deposited volumes will be inspected to ensure they are in good condition (e.g., free of mold and pests; no ripped covers or loose boards; no significant signs of water damage.) If the volume is in minimally acceptable but not good condition, the volume will be flagged for future replacement if a copy in better condition becomes available.
3. Volumes which are already in storage will not be inspected retroactively, because that would be prohibitively expensive. If a future request for a volume reveals that it is mutilated or in poor condition, the volume will be flagged by WRLC Center staff for replacement.
4. Volumes stored in the WRLC repository which are owned by more than one library in the consortium will be designated as "shared copies". Shared copies must be designated as such in the holding records of the stored volume. The Aladin catalog and the home library catalog (if applicable) will include the statement "WRLC Shared Copy." A note should be included in the staff mode that says "WRLC Shared Copy – Do not withdraw."
5. For statistical and accreditation purposes, libraries which discard their volumes because a shared copy is already in the WRLC repository may continue to count ownership of the materials contributed to or duplicated in the shared collection.
6. Stored monograph volumes, including shared copies, will circulate under the normal borrowing policies of the WRLC libraries, including availability for interlibrary loan.
7. Stored journal volumes, including shared copies, will circulate via article delivery, by onsite review at the WRLC reading room, or when necessary, by sending the volume(s) to a WRLC member library for use in the library only.

Retrieval and circulation of stored materials

1. The owning library determines the circulation category of its individual stored items. Three circulation categories have been defined for stored library materials:
 1. Circulating: Items which may be charged to patrons and removed from the requesting library or the WRLC facility.
 2. Onsite use: Items which must be used at the requesting library or at the WRLC facility.
 3. Restricted: Items which must be used onsite at the owning library (such as special collections or archive materials).
2. Circulation policies for all circulating items are as follows:
 1. The loan period for circulating items will be 8 weeks for all patron categories.
 2. Overdue fines will not be charged for circulating items.
3. Eligible borrowers from any WRLC member institution may use stored materials from any other WRLC member library in accordance with the circulation policies described above.

4. WRLC will charge and deliver circulating items to the requesting library, for subsequent charge to the patron. Items will not be routed first through the owning library, in cases where the requester is not the owner.
5. WRLC will accept retrieval requests by any of the following mechanisms:
 - Telefacsimile
 - Electronic mailEach request must contain sufficient information to identify the specific stored item (not just the desired title), so that WRLC may determine the correct shelf location.
6. Requests received at WRLC by 5:00 pm will be delivered to the requesting library by WRLC courier the following business day.
7. WRLC will photocopy and fax individual journal articles upon request. The delivery mechanism will be at the option of the requesting library: telefacsimile, hard copy (by WRLC courier) or ARIEL.
8. Nonmember libraries wishing to borrow stored items should make a request to the owning library via normal ILL request channels. The owning library will then forward the retrieval request to WRLC, which will retrieve and deliver the item to the owning library's ILL unit. WRLC will respond directly to ILL requests from outside the consortium at such time as the volume of such requests merits setting up the necessary systems (e.g. WRLC connection to OCLC ILL subsystem).

Onsite use of stored materials at the Shared Collections Facility

1. Patrons must present an ID valid for direct borrowing of items from WRLC member libraries.
 2. Items retrieved for eligible patrons will be charged to the patron. Items designated as "onsite use" must be used at the WRLC facility. Items designated as "circulating" may be removed from the WRLC facility once they have been charged to the patron. Such items may be returned or renewed at any member library or at the WRLC facility.
 3. Items designated as "restricted use" may not be used onsite at the WRLC facility. These items must be requested through the owning library and used onsite at the owning library.
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1. Patrons are encouraged to make an appointment when visiting the WRLC facility to use materials onsite. Appointments may be made directly by contacting WRLC's Library Services Assistant, or via staff at a WRLC member library. While every effort will be made to assist patrons who arrive at WRLC during business hours without an appointment, WRLC cannot retrieve materials for patrons at times when no qualified staff member is available.
 2. Business hours for onsite use of materials at the WRLC facility are 10:00 AM to 5:00 PM, Monday through Friday.

Storage of nonlibrary items

1. Other departments of WRLC member institutions outside the main library may store materials at the WRLC facility on a space-available cost-recovery basis. Such materials might include university records, art works, special materials related to faculty or departmental grants, or materials belonging to the law or medical libraries.
2. Direct costs would be recovered through charges for:
 - accessioning
 - retrieval/refile
 - shelf storage (to recover prorated share of utilities and other building expenses)
 - administration
1. Individual arrangements would need to be made for inventory control and delivery, depending on the requirements. Costs of these services would be determined and negotiated with the individual department according to the specific circumstances.
2. These materials will not be interfiled on the same shelf with ALADIN items and will not be included in the ALADIN system.

Storage of nonmember materials

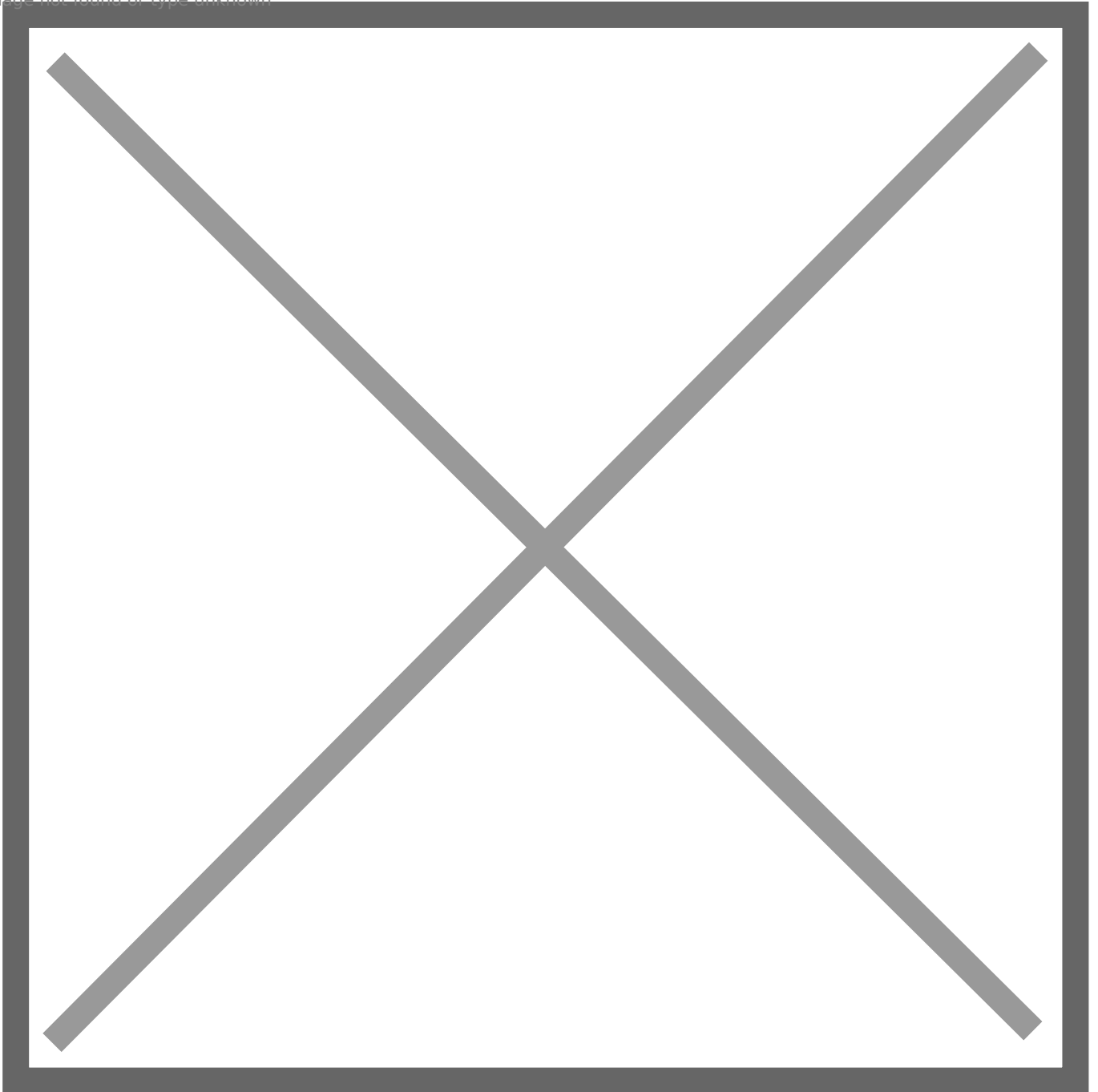
As of February 1, 2002, no nonmember materials will be accepted due to space limitations.

Preparing Items for Accession to SCF Publishing Workflow

Now that we have new architecture in which the owning IZ's item record is used for fulfillment, there are new procedures for preparing items to be sent to the SCF for accessions. Prior to taking any of the steps below, please contact the SCF Supervisor to arrange transport and ensure there is space in the processing areas. Creation of the SCF version of the record will be done automatically by a special script created by Ex Libris. To trigger the script, you will need to do the following:

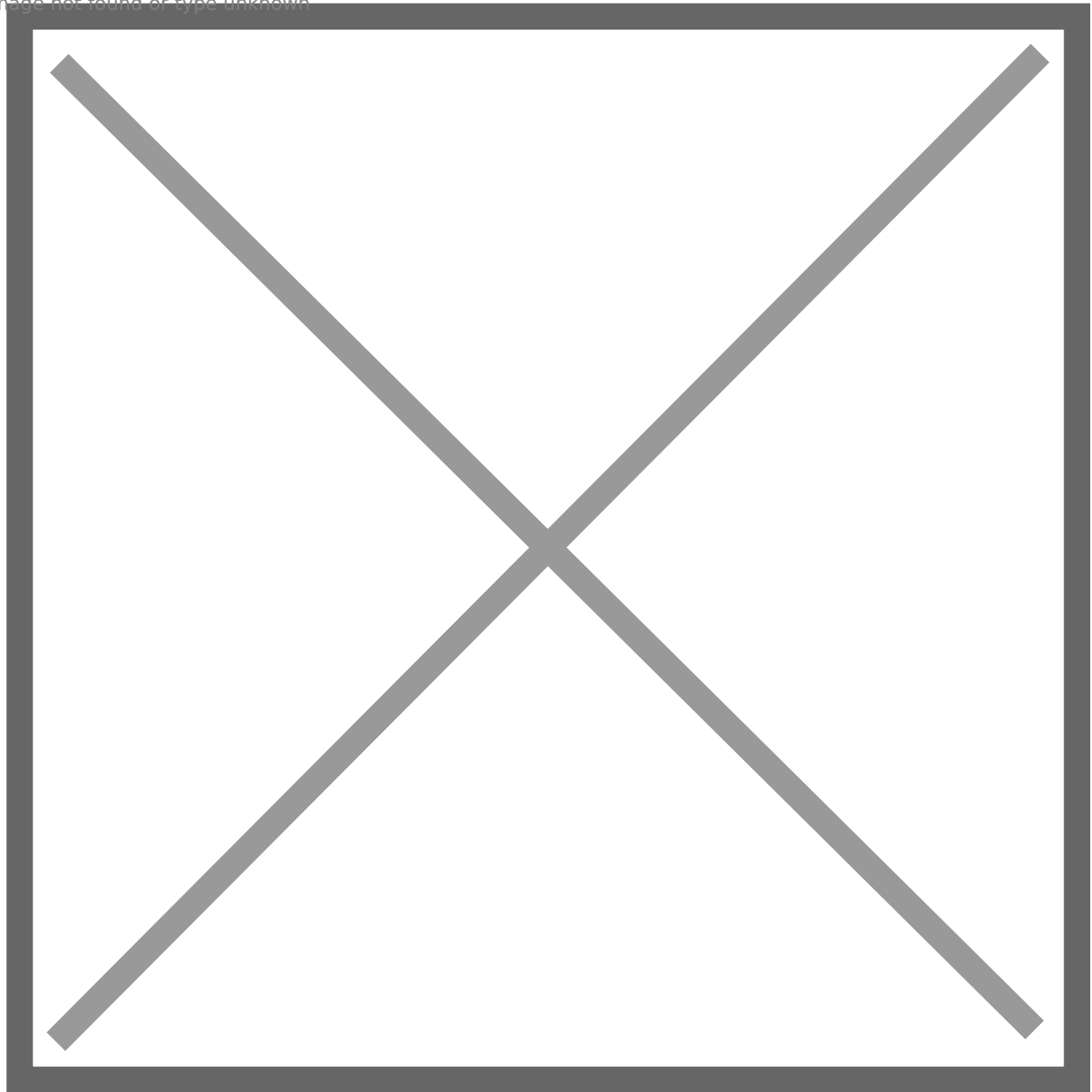
1. Identify item(s) in the owning IZ that you would like to send to the SCF via weeding or other selection process.

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2. Edit the items and give them a temporary location with the type "Remote Storage". You should be familiar with this list and it includes location codes like "wrlc stor" and "wrlc stnc". For the full list or if you aren't certain, you can check the physical locations list as shown below.

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3. Editing the locations can be done to individual records during the weeding/selection process as shown below or as part of a batch change physical items job on a list of barcodes.

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4. Scan in the item(s) barcode – this causes the item to be put in transit or in process so that the item does not appear as available while in transit to SCF and being processed by SCF staff.

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5. Notify the Director of Library and User Services at WRLC and we will run the “**SCF publishing profile**” publishing profile job for your owning IZ. Note: do not edit the publishing profile in any way. This publishing profile uses a logical set of all items with a remote storage location. By running this job we will publish any new additions to this set and your items will automatically have an identical item record created in the SCF IZ.