

ACRL/RBMS Guidelines for Borrowing and Lending Special Collections Materials: Preliminary Hearing

ALA Annual Meeting 2010, Washington, DC.
Saturday, June 26, 2010, 10:30a.m.-12:00p.m.
Grand Hyatt Washington, Meeting Room Constitution E

Members Present: Hjordis Halvorson (Chair), Christian Dupont, Jeffrey Marshall, Laila Miletic-Vejzovic, Heather Smedberg (Recorder), Shannon Supple

Members Not Present: Cherry Williams

Guests: Jennifer Bartlett, John Buchtel, Faye Chadwell, Margaret Ellingsen, J.B. Hill, Ethan Henderson, Donna Hirst, Geneva Holliday, Elizabeth Johnson, Sunnie Kim, Mary Lacy, Dennis Massie, Fernando Pena, Roberta Pilette, Laurie Preston, Jennifer Schaffner, E.C. Schroeder, Catherine Uecker

Welcome and Introductions

Introduction of the current draft and discussion:

The task force was created with the charge to combine the existing *ACRL Guidelines for Interlibrary Loan of Rare and Unique Materials* and the *Guidelines for Borrowing and Lending Special Collections Materials for Exhibition* into one set of guidelines. The draft under review at this hearing represents the work of the task force to this date. Some sections of the draft document have been more heavily worked over than others.

The discussion focused on the following sections of the document:

1. Purpose and Audience and Principles:
 - a. Define Special Collections not just by format of materials but also define what is a special collections library or department. ARL Special Collections Working Group and OCLC Shares glossary were noted as potential resources for this definition.
 - b. Include artworks among the list of formats.
2. General Guidelines for Borrowing and Lending Institutions:
 - a. Much of the discussion revolved around point 4a, which states that “All loan arrangements should be specified in a written loan agreement that is accepted and authorized by appropriate representatives of both the borrowing and lending institutions.”
 - i. OCLC policy directory is designed to include any conditional lending policies and could be used as a place to document blanket policies to which the parties agree each time an ILL loan is conducted.

- ii. It was suggested to include some guidance on when written documentation should move from more informal (e.g., email) to formal legal contract.
 - iii. Clarification about ILL contracts in general may be useful and the document should state that an ILL transaction is a legal contract.
 - iv. Concern was expressed that the word “all” is restrictive and may lead to bottle necks and inefficiencies in ILL processing. The ILL librarians in the room suggested this language is okay because the guidelines will be applied to local policy and not taken as a prescriptive.
 - b. It was agreed that this section needs work to address each of these and comments and to ensure that the language of the guidelines sufficiently supports the spectrum of ways loans are documented.
3. Additional Guidelines for Borrowing and Lending Institutions: no comments
4. Loans for research Use:
- a. The section heading introduces the term Loans for Research Use rather than the term Interlibrary Loan, which has been used elsewhere in the document. It was recommended that the guidelines make this language consistent throughout.
 - b. Should the guidelines specify more regarding scan-on-demand? The consensus was no, this is a local issue.
5. Exhibition Loans:
- a. Subsection on appraisals was seen as unclear and overly prescriptive.
 - b. Subsection on travel arrangements could be simplified.
 - c. The task force will give this section attention.
 - d. Many points in the discussion of exhibition loans reflected a desire for clarification on very specific best practices well beyond the charge of this group. It was seen by all in attendance as a worthy undertaking for a future group, however.
6. Concluding comments: Attendees are encouraged to contact the task force with additional comments and to share example policies, condition reports, etc. to include as appendices.

Next steps:

- 1. Have a final draft completed within the next couple of months
- 2. Task force will seek feedback from specific individuals and organizations in September or so.
- 3. Plan for a final hearing at Midwinter
- 4. Seek comments from as many interested parties as possible.

Submitted 8/9/10