Access Policy for WEST Archives

Introduction & Executive Summary

As outlined in the [WEST Program Statement](#) signed by all WEST members, WEST Archive Holders agree to make archived materials available to other WEST members, and to any other libraries to which Archive Holders lend materials, in accordance with this Access Policy, using established local practices, systems, workflows, and policies:

> 2.9. **Access to the Materials**: Archive Holders agree to make the materials available to other WEST members in accordance with the applicable Interlibrary Loan policies and procedures of the Archive Holder as follows:
>> 2.9.1. **Reproductions**: Archive Holders agree to fulfill requests for photocopies/electronic delivery of any of the archived materials.
>>
>> 2.9.2. **Building Use Only**: Original materials may only be provided for onsite use at the Archive Holder library or at the requesting WEST Member library.

Purpose and scope of this policy

- To describe Archiver responsibilities for sharing WEST archived materials with external users and some Borrower responsibilities
- To describe delivery policies/standards
- To describe how WEST tracks resource sharing statistics

WEST members who wish to provide feedback on this policy may do so by [submitting comments to the WEST project team](#) through the WEST website. Edits and suggestions will be reviewed and, as appropriate, accepted by the WEST Operations and Collections Council (OCC). The WEST Operations and Collections Council (OCC) may review and update this Disclosure Policy periodically to ensure currency of the contents.

Access to the WEST archives

1. WEST Archive Holders will provide access to WEST archived materials to library users affiliated with any other WEST member.
2. WEST Archives are accessible to organizations subscribing to the Interlibrary Loan Code of the United States or the IFLA Guidelines for Best Practices in Interlibrary Loan and Document Delivery.
3. To facilitate ongoing access for WEST members, WEST archived materials should not be placed on course reserves.
4. Archive Holders may make WEST archived materials available to commercial and non-profit organizations with which they are collaboratively or contractually engaged (e.g., reformatting/digitization agents).
5. WEST members are encouraged to license electronic journal backfiles or use e-journals held in digital repositories, when possible and available, to relieve access demands on physical archives.
6. WEST Archive Holders are encouraged to digitize and digitally preserve high risk level print archives, when feasible, to provide additional electronic access.
7. WEST Archive Holders are encouraged to provide access to general and/or special collections that are not archived for WEST to library users affiliated with any other WEST member.

Delivery guidelines for requested WEST materials

In response to a request, the following delivery methods are preferred and recommended, in order of precedence:

1. Provide electronic document delivery (including color scans when appropriate)
2. Provide photocopies
3. Loan the physical issue or volume to the borrowing institution for building use only when appropriate. If a physical loan is not appropriate given the fragility of the physical issue or volume, local loan policies, or given another relevant concern, then electronic document delivery or photocopies may be provided instead.
   a. Exception to WEST Program Statement 2.9.2: Archive Holders may choose to circulate physical volumes of low risk level (formerly known as Bronze) titles to the Archive Holder's own authorized borrowers for use outside the library.

Liability for damage or loss of ILL materials

The safety of the borrowed material is the responsibility of the requesting institution from the time the material leaves an Archive Holder until it is received back by the Archive Holder. If damage or loss occurs, the requesting institution must meet all costs of repair or replacement in accordance with the preferences of the Archive Holder (including re-validation costs).

Members should refer to [WEST's Guidelines for Replacing or Transferring Archived Titles](#) if damage or loss occurs.

Recommended Best Practices for Loaning WEST Archived Materials

WEST supports, endorses, and encourages member libraries to adhere to the accessibility standards and best practices being set by other resource sharing programs and consortia with resource sharing expertise such as the [Greater Western Library Alliance (GWLA) Resource Sharing Reciprocity Agreement](#) and the [SCELC Resource Sharing Toolkit](#). Specific policies outlined in the documents referenced here include:

- Provide fee free or reciprocal lending whenever possible
- Provide clean scans with minimal white space and a minimum document quality of at least 300 dpi (a higher dpi is preferable whenever possible); scan documents in color when requested
- Provide loans of at least 16 weeks for returnables and renew generously if possible
- Provide prompt service and shipping to other member institutions with shipment tracking when possible

Where members are unable to meet these standards, we encourage the member to communicate this to the borrowing institution up front.

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Approved by WEST Executive Committee (August 2011)
Updates approved by the Operations and Collections Council (January 2026)

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Access in the Rosemont Shared Print Alliance[1]

WEST is a member program in the [Rosemont Shared Print Alliance](). WEST members can access shared print collections retained by other member programs in the Alliance on the basis of the Alliance's [Access Principles](), which state, "Participants agree to make Rosemont Alliance archived materials available to other Rosemont members."

Per the Rosemont Alliance [Reciprocal Retention Agreement](), all member program retentions are also retained on behalf of the Alliance and are subject to its [Access Principles]().

Acknowledging that infrastructure to support cross-program discovery and sharing continues to evolve, WEST Archive Holders should make good faith efforts to share with [Rosemont Alliance participating libraries]() that request access to WEST-archived titles.

Gathering and reporting WEST resource sharing statistics

WEST staff gather and analyze lending statistics on behalf of the program via OCLC group statistics and reports made available through resource sharing platforms.

WEST Archivers are asked to gather and report statistics per guidelines and templates provided by WEST.

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[1] The Rosemont Shared Print Alliance has merged with the Partnership for Shared Book Collections to form the Shared Print Partnership (SPP). The section will be updated as needed to reflect changes resulting from this merger.

Appendix A: Tools and Resources to Support Discovery and Access

- OCLC Profiled Group.[2] WEST works with OCLC to maintain a Profiled Group called "WEST," which is a grouping of all WEST member libraries' institution symbols.
  - WEST members must have a WorldShare ILL subscription to leverage the OCLC Profiled Group.
  - Members will be able to view each other's bibliographic, local holdings and summary holdings records through FirstSearch using that Profiled Group.
  - The Profiled Group may be used to control lending via automatic deflection and other rules via the OCLC Policies Directory. It can also be used with OCLC's Automated Request Manager (ARM) System.

- RapidILL Pod. WEST works with RapidILL to maintain a pod called "WEST." WEST members who are already members of RapidILL may opt into the WEST pod in order to support sharing of WEST archived titles (without any additional charge). WEST members who are not RapidILL members but are interested in becoming members should contact RapidILL@exlibrisgroup.com.

- WEST MARC-Formatted Records. Each year, WEST releases a fresh file of MARC-formatted records for the program's archived titles. Members may choose to load those MARC records into their local catalogs to facilitate discovery of the WEST archived collection. Please see this blog post for more information.

- AGUA and PAPR. All WEST members have access to the full list of WEST archived titles through the AGUA dashboard. If WEST members would like to explore the archived titles of other shared print programs, such as WEST's partner programs through the Rosemont Alliance, all title lists and search capabilities are available through the Print Archives Preservation Registry (PAPR).

- OCLC Resources and Tools. OCLC offers a number of tools and capabilities through which WEST members who subscribe to OCLC services may discover and explore shared print retentions. Please see OCLC documentation for more details.

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[2] Profiled Groups are only available when lending strings are being built automatically. If ILL staff are *manually* building lending strings the WEST Profiled Group will not be visible. In this case, the WEST member could choose to create a Custom Holdings Group that includes WEST members. WEST member OCLC symbols are available for members to replicate this group. Custom Holdings Groups can also be used in automation.

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Appendix B: Technical Guidelines and Important Notes for Lending and Borrowing

System Setup To Support WEST Lending

I.   Lending WEST items

To prepare for lending, WEST Archive Holders and Builders should make the following changes:

1. Set up OCLC Policies Directory entries for the institution's OCLC symbols
   a. Update policies specific to WEST or shared print.
      i. For "Copy" policy, enter policies related to delivery of physical or digital copies.
      ii. For "Loan" policy, definitions may vary.
         1. If you provide loans of these materials in general, enter your usual loan policies.
         2. If you will loan WEST volumes only to WEST members (by local policy), indicate this in the policies directory. No deflection rules can be used. WEST membership will need to be determined on a per request basis by identifying the specific title as WEST (using local ILS or other means) and the borrower using the WEST Profiled Group.

2. Set up local Resource Sharing Management System(s)
   a. ILLiad
      i. No additional set-up steps are defined for ILLiad.
      ii. Log in to ILLiad to process any incoming requests for WEST items.
   b. WorldShare ILL
      i. Define OCLC Policies Directory for the OCLC symbol as described above.
      ii. Log in to WorldShare ILL to process any incoming requests for WEST items.
   c. RapidILL
      i. Ensure that your institution's submitted holdings include WEST archived titles and/or that holdings locations where WEST archived titles are housed are set for lending.
      ii. Log in to RapidILL or the local system into which RapidILL is integrated and process any incoming requests for WEST items, following established RapidILL service expectations.

II.   Important Notes for WEST Archive Holders and Builders

- In keeping with the WEST collections model and validation standards, medium and high risk level holdings that are physically loaned will be re-validated by the Archive Holder upon return to ensure their completeness and condition.
- For items in open stacks only, Archive Holders may choose to circulate physical volumes to the Archive Holder's own authorized borrowers for use outside the library.
- Archive Holders make local decisions about whether to lend their WEST archived titles to institutions outside of WEST. WEST encourages making the content as widely available as possible per the guidelines outlined in this policy.

System Setup to Support WEST Borrowing

I.   Borrowing WEST Items

To prepare for borrowing, WEST member libraries should make the following changes:

1. Set up OCLC Constant data
   a. Add "WEST" to the Affiliation list, so that "WEST" will automatically display on borrowing requests.

2. If manually building lending strings, set up an OCLC Custom Holdings Group (see footnote on page 3)
   a. A list of WEST institution OCLC symbols is available for member use.

3. Set up RapidILL
    a. If desired, opt into the RapidILL WEST pod. WEST members who are already members of RapidILL may opt into the WEST pod in order to support sharing of WEST archived titles (without any additional charge). WEST members who are not RapidILL members but are interested in becoming members should contact RapidILL@exlibrisgroup.com.

II.   Important Notes for ALL WEST Members
- Please add a note to your request if the physical volume is needed.
- WEST's Access Policy states that local policies and practices define resource sharing for WEST archived materials. Please check the OCLC Policies Directory before making requests for WEST materials to determine individual Archive Holder or Builder lending policies and fees.