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### COLUMN EDITOR'S NOTE

This column focuses on formal collaboration and networking among libraries through consortia. It offers in-depth examinations of issues facing modern library consortia including (but not limited to) e-resource licensing, ebooks, next-generation integrated library systems, shared print archiving, resource sharing, shared digital repositories, governance, planning, open educational resources, affordable learning, and other relevant topics to library consortia. Contributions are accepted for this column and must be submitted to George Machovec ([george@coalliance.org](mailto:george@coalliance.org)). Contact the column editor for suggested topics, deadlines and formatting.

## Reciprocal On-site Access: Sharing Information by Sharing Library Spaces

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### ABSTRACT

On-site reciprocal access to libraries is a valuable benefit of consortial membership. This article details its advantages, offers a sample of some ways in which consortia facilitate such access and reviews the work of the authors, within the SHARES consortium, in this area. Relevant challenges to creating policies, as well as suggestions about how to determine best practices, will also be offered for librarians and their partners to consider and build upon.

### KEYWORDS

Reciprocal access; reciprocal borrowing; SHARES consortium; reciprocal on-site library access; resource sharing

Facilitating access to information by sharing library resources is central to everything that librarians and libraries do. We share the physical materials that we purchase and the e-resources that we license. We also share information when we host programs, when we support open access publishing and when we build institutional repositories. We share with our local library users, and, by participating in interlibrary loan services, we share with the users of other libraries. Consortial memberships offer librarians even more ways to facilitate information access by sharing it. Although consortia are made up of distinct libraries that serve particular constituencies, no library, alone, can provide its community members with local access to all the information that they might need. So, within consortia, we can share physical and digital information resources, as well as cataloging, catalogs, reference chat services, collection development, space in print repositories and more, including on-site library access.

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47 Equal access to a public good, like information, is a powerful ideal; and, completely  
48 open access to public libraries is, in large part, what makes all libraries such meaningful  
49 signifiers, in both symbolic and practical ways. Some academic and special libraries are  
50 also open to all, which means that they also deal with the needs, the challenges and the  
51 rewards of serving the public at large. But most other libraries, of all types, have access  
52 policies – preferably, although not always, written and posted – detailing who their pri-  
53 mary users are and under what circumstances others can gain access to their resources,  
54 including their spaces. All librarians try to responsibly manage their resources to best  
55 serve their specific constituencies; and, many believe that the best way to do so is by  
56 sharing them, so that all information seekers have access to more.

57 Of course, there are risks, some real and some perceived, to sharing more and being  
58 more open – the same risks that echo the fundamental library debate between access  
59 and preservation that librarians confront when offering any library service to anyone at  
60 any time. But, any risks can be addressed with appropriate attention. And, the benefits  
61 of access to other libraries are as real as any risks. Reciprocal on-site access clearly bene-  
62 fits any individual seeking information to study, research and learn, including distance  
63 education students, researchers doing fieldwork or anyone home during school breaks.  
64 A library user from any library, even the largest, may need access to other libraries. The  
65 benefits to society of an educated citizenry, with equal access to information, are equally  
66 clear. And, libraries, as well, can benefit from welcoming more people to use their  
67 spaces. One of our shared challenges is to encourage more people to use our resources.  
68 Collecting use data that demonstrates that our spaces are in demand can help librarians  
69 advocate for both space and resources. Reciprocal on-site library access can also contrib-  
70 ute to the reputation of institutions. It can encourage scholarly communication and col-  
71 laboration. It is unlikely that masses of people will descend on any one library at any  
72 one time. (Except, perhaps, during midterms and finals, when temporary restrictions

73 can be put in place.) And, foremost, it enables information access to those who need it,  
74 which is directly in keeping with the most fundamental values and essential goals of  
75 librarianship.  
76 Consortial policies regarding reciprocal on-site library access exist to manage and  
77 expedite library access by minimizing friction. Clear, explicit policies and procedures  
78 that are easy to implement, rather than blanket restrictions or overly complicated work-  
79 flows, mean that security or access staff will not unnecessarily turn away visitors.  
80 Beyond this, directory information and additional communication between libraries and  
81 library users is also necessary to ensure that visitors are aware of practical issues, such  
82 as changes in hours, the temporary closing of certain spaces or where they can park.  
83 Visitors may also need to make arrangements ahead of time to arrange for off-site  
84 material to be made available or to speak with particular librarians. Making all of this  
85 clear minimizes problems and encourages use, enabling motivated information-seeking  
86 users of member libraries to visit libraries within their consortia with a minimum num-  
87 ber of straightforward steps.

88 In determining how open our library spaces are, librarians balance a commitment to  
89 sharing resources and facilitating access to information with apprehensions about risks,  
90 such as security and overcrowding. The role of consortia in framing discussions about  
91 library access is to ensure that all points of view are heard and respected, while helping  
92

93 libraries to minimize risks and craft policies that are based on facts, rather than on  
94 imagined or exaggerated concerns. To this end, within consortia, and within libraries,  
95 space studies, beyond gate counts, should be undertaken. We need to consider how  
96 much space is needed per library user and study whether being crowded necessarily  
97 equals noise and distractions. We do not want our local users to be uncomfortable or  
98 unable to find a place to work in our libraries. But, while library users certainly do  
99 appreciate space to spread out and to concentrate, empty library seats are not motivat-  
100 ing to studying students, library funders, or librarians.

101 It is also imperative to find a balance between an open society and a safe one, and  
102 between security and privacy. Grappling with security is a societal imperative, and  
103 librarians recognize that safety concerns in libraries, as in society at large, are real.  
104 There is an entire literature of library security with its own best practices and debates.  
105 At the same time, librarians are properly wary of surveillance. Appropriate security  
106 efforts and behavior policies are appreciated, but a lack of privacy is antithetical to free-  
107 dom of information and a free society. The role of a consortia is to build consensus  
108 and guide discussions about the need to take precautions that we would not be comfort-  
109 able taking with local users, such as taking pictures or keeping lists of names. (Although  
110 librarians do keep names when people borrow material, such data should not be kept  
111 once material is returned.) We also need to balance security with making library users  
112 feel welcome and comfortable. Librarians work hard to make libraries safe spaces that  
113 also contribute to a more open society where access to information benefits us all. So,  
114 such questions may be decided differently among libraries and among consortia. But,  
115 they deserve open discussion and consideration by all librarians.  
116

### 117

### 118 **Examples of consortial on-site reciprocal access policies**

119 The results of discussions about how to balance these issues and facilitate on-site access  
120 can be seen among members of the many consortia that implement on-site reciprocal  
121 access policies as part of their mission to improve access to resources. Many of these  
122 policies are available for review on consortia websites. Others may have more informal  
123 arrangements. These range from simply showing a valid ID from any member library,  
124 to arranging for access to another library, in advance, through home libraries, with calls,  
125 emails, or paper and online forms. Some include only on-site access while others enable  
126 reciprocal borrowing of materials as well. Librarians within consortia, or looking to join  
127 consortia, should inquire about and investigate the details within their groups, as well  
128 as consider reviewing current practices; and, they should certainly let their users know  
129 about this valuable benefit.  
130

131 As one example, consider the Big Ten Academic Alliance ([https://www.btaa.org/  
132 home](https://www.btaa.org/home)), a collaborative of 14 U.S. universities committed to “advanc[ing] their academic  
133 missions, generat[ing] unique opportunities for students and faculty, and serv[ing] the  
134 common good by sharing expertise, leveraging campus resources, and collaborating on  
135 innovative programs” (Big Ten Academic Alliance, 2018, p. 2). In the interest of opti-  
136 mizing the use of campus resources, the Big Ten Academic Alliance provides a number  
137 of services to its members, including on-site access and borrowing privileges. Students  
138 (undergraduates, graduates, and post-doctoral) and faculty enjoy on-site access and

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139 borrowing privileges at member institutions. The arrangement is governed by a recipro-  
140 cal on-site borrowing agreement ([https://www.btaa.org/docs/default-source/library/btaa-  
142 clirecipagreement2016.pdf?sfvrsn=2](https://www.btaa.org/docs/default-source/library/btaa-<br/>141 clirecipagreement2016.pdf?sfvrsn=2)) covering eligibility, procedures, fees and financial  
143 responsibilities, and accessibility. To take advantage of on-site access and borrowing  
144 privileges, users must present their university ID (and a photo ID if the university one  
145 does not include a photo). Their account must also be in good standing. Verification  
146 and validation of user accounts is done through an authentication software developed  
147 for the Big Ten Academic Alliance by the University of Maryland's University Libraries  
148 Digital Data Services (<https://borrow.btaa.org/>) (Big Ten Academic Alliance, 2016).

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149 Orbis Cascade Alliance is another large consortium, consisting of 38 schools  
150 located in Idaho, Oregon, and Washington. This consortium collaborates on a shared  
151 discovery tool and library management system, collection development and access to  
152 resources for members (<https://www.orbiscascade.org/overview-of-the-alliance/>). In  
153 its 2019–2024 strategic plan, the Orbis Cascade Alliance identified as one of its guid-  
154 ing themes “Improve Access to Information” (file:///C:/Users/User/Downloads/12-  
155 2018%20Public%20Message%20about%20Results%20of%20Strategic%20Planning.pdf). The  
156 Alliance offers a program called Summit Visiting Patron – “Away from the Library” in  
157 which users from member institutions can enjoy on-site access and borrowing at other  
158 member institutions. As with the Big Ten Academic Alliance, Orbis Cascade Alliance  
159 patrons must have a valid institutional ID and their account must be verified at their  
160 home institution in order to participate in the program. Patrons are verified by logging  
161 into their library account at their home institution or by library staffing calling the home  
162 library for verification. Once the account has been verified, a visiting patron account is  
163 created at the institution (<https://www.orbiscascade.org/away-from-the-library/>).

164 On a smaller scale, there is the CTW Consortium, consisting of Connecticut College,  
165 Trinity College, and Wesleyan University ([https://www.wesleyan.edu/libr/services/other-  
167 libraries.html#ctwvsill](https://www.wesleyan.edu/libr/services/other-<br/>166 libraries.html#ctwvsill)). This consortium was formed in 1987 to help alleviate the finan-  
168 cial and development burden of an integrated library system (CTW Consortium 2009).  
169 As the partnership evolved, reciprocal borrowing and resource sharing agreements were  
170 formed. The consortium has, as a primary part of its mission, “... to share library col-  
171 lections among member libraries” (CTW Consortium 2009). In addition to its other  
172 goals, the CTW Consortium emphasizes access to resources as central to its mission.  
173 Patrons at the three member schools can request material online and have it delivered  
174 to their home institutions, or they can go to the partner institution library with a valid  
175 institutional ID and borrow material there. The consortium is governed by an Access  
176 and Circulation Policies Statement ([http://ctw.blogs.wesleyan.edu/files/2018/12/Access-  
179 and-Circulation-Policies-of-CTW-Consortium-Libraries\\_-General-Statements-June-2013.  
180 pdf](http://ctw.blogs.wesleyan.edu/files/2018/12/Access-<br/>177 and-Circulation-Policies-of-CTW-Consortium-Libraries_-General-Statements-June-2013.<br/>178 pdf)) that details patron access, circulation policies, privacy, and fines and fees. The  
181 member institutions have also agreed to loan periods and limitations ([http://ctw.blogs.  
183 wesleyan.edu/files/2014/01/CTW-Circulation-Policies-Grid-May-2017.pdf](http://ctw.blogs.<br/>182 wesleyan.edu/files/2014/01/CTW-Circulation-Policies-Grid-May-2017.pdf)).

184 The Boston Library Consortium (BLC) is an organization of 19 libraries in  
185 Massachusetts, New Hampshire, Connecticut and Rhode Island (Members, n.d.)  
186 “... focused on providing high quality and cost effective sharing of print, digital and elec-  
187 tronic content across the member libraries ...” (About Us, n.d.). The BLC considers  
188 access a core value of the consortium, stating that “... all information resources provided

185 directly or indirectly by its member libraries should be readily, equally, and equitably  
186 accessible to all the members of its community.” (Boston Library Consortium, 2019). In  
187 addition to an interlibrary loan agreement, patrons from each member library have the  
188 opportunity to access and borrow materials from other member libraries using the BLC  
189 Consortium Card (Borrowing from BLC Libraries, n.d.). Different libraries have different  
190 policies regarding the consortium card application, but generally one must be in good  
191 standing with their home institution and some patrons may be expected to demonstrate a  
192 specific research need (Consortium Card, n.d.). Not all libraries require a consortium  
193 card to access materials on-site, but the card is required to borrow directly from another  
194 institution. Patrons are responsible for checking the policies and procedures of the library  
195 they wish to visit as borrowing and access policies can differ. Once approved, by both  
196 their home library and the library they wish to visit, patrons will have direct on-site  
197 access and direct borrowing privileges while their consortium card is active. Consortium  
198 cards do need to be updated at specific intervals set forth by their home institution  
199 (Consortium Card, n.d.). The BLC is planning on releasing an online form for consorti-  
200 um card applications in the near future (Boston Library Consortium: Home, 2019).

201 The Pennsylvania Academic Library Consortium, Inc. (PALCI) is a consortium consisting  
202 of around seventy academic and research libraries in New Jersey, New York, Pennsylvania,  
203 and West Virginia whose “... mission is to build access through collaboration among aca-  
204 demic libraries ...” (An Overview of PALCI, n.d.). Forty-six or so of these institutions par-  
205 ticipate in a reciprocal on-site access program. Patrons who are interested in this program  
206 can access a list of participating libraries on the PALCI website in a spreadsheet that lays out  
207 which patrons are eligible at each library (Reciprocal On-Site Borrowing Participating  
208

209 Libraries, 2017). To participate, patrons must fill out, and have their home library approve, a  
210 PALCI Reciprocal On-Site Borrowing Authorization Form before registering at the library  
211 they wish to visit. Patrons are asked to check the PALCI Reciprocal On-Site Borrowing  
212 Procedures form to make sure they are aware of the policies regarding reciprocal borrowing  
213 (Reciprocal On-Site Borrowing Program Procedures, 2016). As with most other consortia,  
214 patrons should check with the library they intend to visit for specific policies regarding  
215 access and direct borrowing, but the Reciprocal On-Site Borrowing Procedures does outline  
216 basic patron and library responsibilities.

217 These examples, and more, from around the world – such as the use of a common  
218 library card among academic libraries in Hong Kong ([https://www.julac.org/?page\\_id=](https://www.julac.org/?page_id=3614)  
219 [3614](https://www.julac.org/?page_id=3614)), The Society of College, National and University Libraries (SCONUL) Access in  
220 the UK and Ireland (<https://www.sconul.ac.uk/sconul-access>), and Denmark, where any-  
221 one can use or borrow from any library ([https://archive.ifla.org/VII/s8/annual/cr02-dk.](https://archive.ifla.org/VII/s8/annual/cr02-dk.pdf)  
222 [pdf](https://archive.ifla.org/VII/s8/annual/cr02-dk.pdf)) – point to both instructive commonalities and differences in how consortia handle  
223 reciprocal on-site library access. All deserve further examination, both to ensure that  
224 they are working well and to elucidate ways that librarians might rethink current practi-  
225 ces to improve both processes and outcomes.

## 226 Rethinking best practices for SHARES

227  
228  
229 Currently, as members of SHARES, the resource sharing consortium for members of  
230 the OCLC Research Library Partnership (RLP), we are engaged in just this sort of

231 rethinking. The RLP is a transnational network of over 130 research libraries that pro-  
232 vides a collaborative venue where library staff and OCLC Research come together to  
233 address shared challenges. SHARES pre-dates the formation of the RLP, starting out  
234 more than thirty years ago as an activity for members of the Research Libraries Group.  
235 SHARES began as a homogenous group of large North American academic institutions  
236 but over the decades has grown more diverse both in the types of libraries represented  
237 (small and large academic, museum, national, public, special) and in their location. Not  
238 all RLP members participate in SHARES; as of this writing, SHARES includes about 100  
239 libraries at seventy-five institutions in five countries.

240 From the beginning, SHARES has consisted of three components: (1) sharing library  
241 materials via interlibrary loan, at fixed below-market prices, with a “consider every  
242 request” ethos that encourages making exceptions for special requests from SHARES  
243 partners whenever possible; (2) collaborative projects aimed at addressing collection-  
244 sharing challenges held in common; and (3) reciprocal on-site access.

245 A point of emphasis has always been to keep the process for SHARES reciprocal on-  
246 site access as simple as possible; guidelines have long stipulated that SHARES visitors  
247 should be able to show up at any partner library anytime that library is open and gain  
248 access simply by presenting a valid ID issued by their home institution. Eligible constit-  
249 uents have been listed as staff, faculty, and graduate students.

250 For decades, these guidelines worked well for a homogenous group of North  
251 American large academic institutions. Every library kept a list of SHARES institutions  
252 at their access desks. All participating institutions issued photo ID’s with validation  
253 stickers to their constituents. But several changes in the SHARES environment and in  
254 the library community in general have complicated what had been a simple, elegant,  
255 and low-overhead reciprocal on-site access program. As other types of libraries joined  
256 SHARES – national, public, and art museum libraries, for example – terms such as  
257

258 “faculty” and “graduate student” did not describe every class of SHARES patron who  
259 could benefit from reciprocal on-site access within the consortium. Increasingly, ID’s  
260 issued by SHARES institutions lack photos and any indication of the time period for  
261 which the ID is valid. Heightened security concerns have also led many libraries to  
262 institute more stringent protocols for vetting visitors, such as requiring them to report  
263 to a privileges office during regular business hours to receive a reader card before being  
264 allowed to access the library.

265 Further complicating the robustness, predictability and efficiency of the on-site access  
266 component of SHARES is the varying degrees of enthusiasm for reciprocal on-site  
267 access among the diverse and far-flung SHARES membership. For example, some mem-  
268 bers are located in the same region with many other SHARES libraries, and have a keen  
269 interest in utilizing the reciprocal on-site access program. Other members are physically  
270 remote from their SHARES partners, and, thus, are less likely to receive SHARES visi-  
271 tors or to have their own patrons seek to visit other SHARES libraries.

272 Meanwhile, a few libraries located in large metropolitan areas receive a constant flow  
273 of SHARES visitors, while others have never received a single SHARES visitor since the  
274 reciprocal on-site access program began more than 30 years ago. And, while there is an  
275 agreed-upon pricing structure for filling SHARES interlibrary loan requests, libraries  
276 hosting SHARES visitors receive no credit or reimbursement. (Such arrangements might

277 incentivize more and deeper cooperation, but a workable plan that is easy to administer  
278 and agreeable to all participants has proven to be elusive so far.) Members in cities  
279 where there are clusters of SHARES partners face an additional complication when it  
280 comes to reciprocal on-site access; some make full use of the SHARES guideline that  
281 allows for local policies to supersede the SHARES reciprocal on-site access guidelines  
282 for co-located institutions, while others are interested in promoting even more liberal  
283 reciprocal access among co-located partners than the SHARES guidelines call for.

284 In short, the SHARES reciprocal on-site access program is due for a “refresh.” Some  
285 sustained attention will be required in order to streamline processes, to develop a com-  
286 mon understanding of the value of and expectations for the on-site access program, and  
287 to make the SHARES on-site access experience uniformly predictable, pleasant, and pro-  
288 ductive for staff and library visitors alike.

289 This year, the authors, working as a subset of the SHARES Best Practices Working  
290 Group, are taking on this assignment. Formed in the spring of 2019, our subgroup has  
291 embarked upon a suite of activities designed to engage with all SHARES participants  
292 around making reciprocal on-site access work better for everyone. We will draft and  
293 submit to the SHARES Executive Group more inclusive language for the SHARES recip-  
294 rocal on-site access guidelines, so that the constituents of every SHARES library can see  
295 themselves in the text. In September 2019, we launched a survey designed to gather  
296 logistical and policy information about every SHARES library and are building that into  
297 a reciprocal on-site access directory for use by staff and patrons. In discussions with all  
298 SHARES participants, we will promote the idea of making evidence-based on-site access  
299 policy decisions through the use of tools such as space-use studies. We plan to conduct  
300 a pilot offering enhanced on-site access among some SHARES institutions co-located in

302 the same metropolitan area. And we are looking into adopting an online form for  
303 patrons who wish to visit another SHARES library, with the completed form serving as  
304 an application to be pre-vetted by the patron’s home institution; the home institution  
305 would notify their own patron when the application has been accepted, attaching logis-  
306 tical information about the library to be visited and also copying that other library’s  
307 privileges and access staff. In considering the adoption of such an online form, we hope  
308 to build upon the fine work done by another SHARES group, the steering committee  
309 for the SHARES Reciprocal Onsite Borrowing Pilot Project, which ran from 1  
310 September 2018, through 31 August 2019, before becoming a regular opt-in component  
311 of the SHARES program.

312 The goal of all this work is basic to the SHARES mission, as it is with all consortia:  
313 to provide easy access to more information and more library resources for more library  
314 users. We hope that this more in-depth analysis of the work of one consortia will help  
315 others, as well, in framing and guiding their own considerations of reciprocal on-site  
316 library access policies and procedures.

## 318 Conclusion

319 Librarians within consortia can manage the practical challenges of enabling reciprocal  
320 on-site library access by studying proven procedures and determining best practices. To  
321 attract and keep members, some consortia will require adherence to specific policies,  
322



such as extended loan periods or reciprocal on-site library access. But, there is also an understanding that reasonable librarians can reasonably disagree, that differing user needs, staffing and budget levels will lead to different outcomes and that preferences are subject to change over time. Despite any differences, librarians join consortia to overcome barriers to information access – including everything from license restrictions that prohibit sharing access to databases to restrictions on accessing convenient, comfortable and inspiring library spaces.

Thus, reciprocal on-site library access policies encompass many of the most essential themes and issues within librarianship, including reciprocity, access, preservation, information sharing, network level connections and privacy. To do our jobs well, librarians embrace an ethos of openness, access and sharing. And, given that, reciprocal on-site library access is not an especially brave, foolish or radical next-level practice. It is just another long-standing and invaluable aspect of library service, and a best practice that could be made even better by librarians closely collaborating with colleagues at other institutions to tackle its challenges and realize its benefits.

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