

Statewide Delivery Committee

Report to the MBLC Board

November 2, 2006

**Belmont Public Library
Belmont, MA**

Introduction

The Statewide Delivery Committee was appointed at the November 3, 2005 MBLC Board Meeting, following a statewide delivery summit held on September 20, 2006. Charged to review and clarify a list of priorities that came out of that summit, the Committee held seven meetings between November 27, 2005 and October, 3, 2006. An Interim Committee Report was presented orally at the May 4, 2006 MBLC Board Meeting by Marlene Sue Heroux, Coordinator of the Committee.

Five Subcommittees worked on the following issues: labeling, sorting, cost of delivery, regional member library responsibilities and communications. The committee worked by consensus and came to agreement on the best practices reported here and a recommendation regarding funding efforts to automate the delivery process.

On June 14, 2006, a total of 21 committee members, regional and network administrators and staff participated in a "Delivery Discussion" at the MBLC Office, facilitated by Mary E. Jackson, a national delivery consultant from the Association of Research Libraries in Washington, D.C. A national conference on delivery, "Moving Mountains: A Symposium Exploring Library Courier Services sponsored by the Colorado State Library, held in Denver, September 13-15, 2006 was attended by Marlene Heroux and four regional administrators (Michael Colford, Greg Pronevitz, Cynthia Roach, and Sunny VanderMark). Michael Colford served on the Conference Planning Committee and Marlene and Michael each chaired breakout sessions at the Conference on Best Practices and Policies, and Integrating ILS and Delivery, respectively.

Attached are the Statewide Delivery Committee Roster, Resource Sharing and Delivery Best Practices, and the Committee's Recommendation on Automation.

Marlene Sue Heroux
MBLC Reference Information Systems Specialist

MASSACHUSETTS BOARD OF LIBRARY COMMISSIONERS

STATEWIDE DELIVERY COMMITTEE ROSTER

Ellen Dolan, Library Director
Shrewsbury Public Library
609 Main St.
Shrewsbury, MA 01545-5699
508.841.8537
edolan@th.ci.shrewsbury.ma.us

Michael Colford, Administrator
Boston Massachusetts Regional Library System
Boston Public Library
700 Boylston Street
Boston, MA 02116
617.859.2389
mcolford@bpl.org

Michelle Filleul, Head, Circulation Services
Reading Public Library
64 Middlesex Ave.
Reading, MA 01867-2550
781.942.6702
filleul@noblenet.org

Mary King, Regional Librarian
Western Massachusetts Regional Library System
P.O. Box 609
South Deerfield, MA 01373
413.665.9898
mking@wmrls.org

Susan McAlister, Executive Director
Minuteman Library Network
10 Strathmore Road
Natick, MA 01760-2419
508.655.8008, ext. 237
smcalister@minlib.net

Robert Rezendes, Librarian
Learning Resources Center
Bristol Community College
777 Elsbree St.
Fall River, MA 02720
508.678.2811 ext. 2106
rrezende@bristol.mass.edu

Larry Rungren, Executive Director
Merrimack Valley Library Consortium
123 Tewksbury St.
Andover, MA 01810
978.475.7115
lrungren@mvlc.org

David Slater, Executive Director
Old Colony Library Network
220 Forbes Road Suite 401
Braintree, MA 02184
781.794.2513, ext. 4
dslater@ocln.org

Sondra (Sunny) Vandermark, Administrator
Metrowest Massachusetts Regional Library System
135 Beaver Street
Waltham, MA 02452.8424
781.398.1819
svanderm@mmrls.org

Marlene Sue Heroux, Reference Information Systems Specialist
Massachusetts Board of Library Commissioners
98 North Washington Street – Suite 401
Boston, MA 02114
617.725.1860 ext. 250
marlene.heroux@state.ma.us

Commissioner Liaisons

Katherine K. Dibble
e-mail: kdibble@worldnet.att.net

Elia D. Marnik (through July 2006)
e-mail: eliamarnik@comcast.net

Resource Sharing and Delivery Best Practices

Introduction

The local library, whether school, public, special or academic, has the responsibility to meet the needs of its library users. Resource sharing between libraries supplements local library collections. Reciprocal borrowing and interlibrary loan are the avenues through which this resource sharing takes place. The nine automated resource sharing library networks, as well as the statewide virtual catalog provide the mechanism for library users to request items directly.

The regional and cross-state delivery services provide the infrastructure within which resource sharing is accomplished. Delivery of resources between libraries consistently ranks as one of the most important services offered by the six Massachusetts Regional Library Systems to its members. Delivery services provide the means to transport library resources via ground and water transportation to and from libraries for their users. The goal of this document is to provide information that will lead to the most efficient and best use of the considerable time and effort that library, regional and network staffs invest in the service each day. Recognizing that regional variations may preclude the carrying out of these best practices in full, those practices that are required by all regions are designated with a leading asterisk “*.”

Resource sharing is not free. Collection-building, shipping, staff labor, and supply costs all contribute to the total cost of resource sharing. Regional member libraries agree to participate in interlibrary loan activities within the Commonwealth in accordance with the National Interlibrary Loan Code for the United States. This code places responsibility on the borrowing library, such as paying the cost of a lost item and packaging certain items.

Each part of this delivery process is as important as the next. Informed stakeholders, including library users, library, regional, network, and delivery vendor staff, as well as Commissioners and staff from the Massachusetts Board of Library Commissioners are vital to the success and sustainability of resource sharing in the Commonwealth.

Definition of Delivery Service

The six Massachusetts Regional Library Systems provide member libraries with an efficient and cost effective method for the delivery of materials and information among participating libraries. Delivery service is primarily provided by van or truck, and in some regions, by boat and by U.S. Mail. Eligibility for delivery service varies among the regions, but is mainly determined by the total number of items sent and received by libraries on a weekly basis. In addition to regional delivery services, library materials may be sent between regions through a cross-state delivery service that connects all six regions every weekday. A directory of all libraries in all six regions of the Massachusetts Regional Library Systems and their corresponding routes is maintained by the Boston Regional Library System and is available online at

<http://www.bpl.org/brls/Delivery.htm>. A link to each region's pre-printed delivery routing slips is available at this site.

Responsibilities of Library Users

Library users shall:

1. Be responsible for checked out items. Items that are borrowed can be returned to any library on delivery.
2. Request only as many items as can reasonably be read/viewed/listened to in a loan period.
3. Treat material from each library with care; return in the condition received.
4. Pick up items on hold by the designated pickup date.
5. Return borrowed material on time, and pay any accumulated overdue fines.
6. Assume the cost of lost or damaged material in accordance with the policies of the owning library.

***Responsibilities of All Libraries Participating in Regional Delivery Service**

Libraries shall:

1. Provide the best, most comprehensive service possible to its primary service populations. Resource sharing is a supplement to, not a replacement for, services provided to the library user by their home library. Libraries must purchase popular items such as DVDs, best-selling books, audiobooks on CD, etc. to support library user borrowing patterns (see Collection Development below).
2. Sending CASH and/or valuables through the delivery system is NOT permitted. Neither the region nor a delivery company can take responsibility for any cash or other valuables that are missing from delivery shipments.
3. In the case of a library user who has been declared delinquent or ineligible to borrow by the automated system, the library will follow local network policy to handle the situation.
4. All libraries are responsible for the collection of overdue fines. Charges for lost materials will be returned to the owning library.
5. It is the responsibility of the RETURNING library to make sure that all items are complete and damages are recorded.
6. Correctly label and place into the delivery system any items that are returned to the library whether or not the item was borrowed from that library.
7. Make sure that any bins left from the previous day are clearly marked to assure that pick-up occurs the next delivery day.
8. Sign for delivery and complete other paperwork as required by the region and/or delivery company.
9. Notify the regional office of missed deliveries as soon as possible.
10. Notify the regional office of changes in hours of operation, and holiday and emergency closings prior to the change whenever possible.
11. Notify the regional office of changes in personnel and contact information.
12. Participate and respond to regional semi-annual delivery survey.

13. Maintain open communications with region and network staff regarding issues and planning scenarios to allow all parties to plan for optimal delivery.
14. Libraries participating in regional delivery services and sharing resources agree to abide by the current National Interlibrary Loan Code (a requirement of regional membership, <http://mass.gov/mblc/mblc/regional/membership/eligibility.php>).

Library Staffing Responsibilities of All Libraries

Libraries shall:

1. *Properly train all relevant staff on the best pick list and delivery practices and procedures.
2. Provide enough staffing to complete the pick list/pull list process each week day that the library is open.
3. Have sufficient staff available to clear delivery loads on the day received.

Labeling and Packaging Responsibilities of all Libraries

Libraries shall:

1. *Massachusetts libraries must use standardized delivery routing slips. They are available online in PDF format so that they can be printed and duplicated locally as needed. Type library's name in the "FROM" field before duplicating the slip.
2. *Use pre-addressed routing slips to avoid errors with the library or town name exactly as shown in the *Massachusetts Delivery Routing Directory* (<http://www.bpl.org/brls/Delivery.htm>). It is important to use the delivery slip with the correct code (B, C, M, N, S, or W) for the destination Region as shown in the routing directory.
3. Label envelopes going to specific departments or persons clearly so that they will reach the correct person.
4. If the *Massachusetts Delivery Routing Directory* says "MAIL," or if the library is not listed, the library is not on a delivery route; send the item via U.S. MAIL.
5. Stamp the library and town name AND ADDRESS visibly on all books, AV materials, etc., before lending to other libraries. This will help get the library's materials back.
6. *Consider placing barcodes on the front or exterior of all newly acquired materials in order to be ready for automated sorting of items going into delivery.
7. Secure each single item going into delivery with at least one elastic band.
8. Bundle multiple items in manageably sized bundles (no larger than the average adult human finger span) that are headed to the same location with sturdy elastic bands to save time with sorting.
9. Pre-sort items into a bin for any library that is a regular heavy receiver from you, or for the library that is next on your delivery route. Clearly mark the bin with the library location, eliminating the preparation of many individual routing slips.

10. Common sense should rule in packaging items for delivery. If an item is fragile and could break or be damaged, put it in a padded envelope. Re-using envelopes is fine for delivery as long as the used envelope is clearly labeled and the current destination is obvious. All previous labels or library names should be removed or crossed out; old, frayed or ripped packaging should not be used.
11. Do not tape any notes or names of libraries on any part of a book. U.S. Postal regulations say that tape is the preferred method to secure all types of packages. Staples should not be used to package an item, as they may cause an injury.

Collection Development Responsibilities of All Libraries

Libraries shall:

1. *Purchase popular items such as DVDs, best-selling books, books on CD etc. to support their library user borrowing patterns.
2. Consider downloadable media to meet demand for some titles.
3. Consider leasing copies of high demand titles.
4. Lend material in good condition, and repair worn material before sending it out.
5. Evaluate lost and damaged items for replacement.
6. *Use network reports and other tools to guide local collection development.

Space Needs of All Libraries Participating in Regional Delivery Service

Libraries shall:

1. Make sure that there is sufficient space to process pick list/holds items. There should be ergonomically correct space for emptying and to sorting into delivery bins, and sufficient space for bins to be delivered by and set out for the courier. Presorting may require additional space for both processing materials and setting out bins.
2. Provide a key to the building or a doorbell if the entrance that the delivery driver uses is kept locked.
3. *The delivery location should be convenient for parking the delivery vehicle, and as close as possible to where the delivery person enters the building.
4. A delivery person carrying large bins or wheeling a handcart stacked with bins must be able to easily access the delivery location within the library. Stairs, heavy doors and narrow passages make delivering difficult and dangerous.
5. For libraries that do not receive stacks of bins delivered via a handcart, a surface should be provided that is approximately waist high to hold bins being picked up. This surface should be large enough to allow the delivery person to put the first incoming bin down before removing an outgoing one.

Planning Delivery Workspace for New and/or Renovated Libraries

Libraries shall:

1. Plan to provide at least 20 square feet of space per delivery bin that the library receives per delivery. This allows space for delivered bins, workspace for sorting, and spare bins as needed.
2. Plan for additional delivery volume, necessitating increased library use of new or renovated facilities (by as much as 50%) when considering delivery space.
3. Budget appropriately for delivery space. The square footage for a library that receives delivery of 7-8 bins daily is approximately 150 square feet, costing approximately \$52,000 to \$79,000 (as of spring 2006).
4. Install comfortable flooring in delivery area for sorters who are on their feet for hours at a time.

Responsibilities of the Pick-up Library

The **pick-up library** is the location from which the library user actually picks up the materials they requested.

The pick-up library shall:

1. Provide accurate information to library users on the reciprocal borrowing rules and procedures.
2. Assist with the retrieval of delinquent material borrowed by one of its registered library users and follow-up when a library user fails to return an item.
3. Collect fees for lost borrowed items.
4. Overdue fines are collected, and kept by the pick-up library in accordance with its own policies.
5. *Notify the library user promptly that items are available for pick-up.

***Responsibilities of the Regional Library Systems**

The Regional Library System shall:

1. Investigate ways to increase efficiencies in the delivery system.
2. Provide accurate and ongoing information to participating libraries on delivery rules and procedures.
3. Promptly update libraries on delivery issues such as schedule changes, substitute drivers or other important announcements via Email and/or telephone.
4. Provide information and maintain good communication with delivery couriers and automated resource sharing networks.

5. Provide training that keeps regional members current with guidelines for the efficient use of Regional and cross-state delivery systems, and provide members an opportunity to communicate about delivery matters.
6. Monitor resource sharing network memberships as a way of preparing for increases in delivery loads. Help member libraries prepare for the added work and the increased space burdens placed on individual libraries that achieve full network membership.
7. Implement a delivery survey bi-annually. Member libraries receiving delivery service are expected to sample and report delivery statistics during these weeks.
8. Work with delivery vendor, libraries and network(s) to prepare “disaster” plan for emergencies.

***Responsibilities of the Automated Resource Sharing Network**

The resource sharing network shall:

1. Implement the Integrated Library System software to achieve the most efficient workflow for resource sharing (i.e., pre-printed delivery and transit slips; select by pickup location versus patron affiliation; assign priority to branch over a library on delivery, etc.).
2. Provide network transfer and system-generated borrowing and lending statistics to members to monitor use patterns and develop and refine policies and procedures that provide consistent practices within a network.
3. Work with member library committees and representatives of regional library systems to design the **smartest** systems for resource sharing.
4. Share information with region(s) about policies and network changes that might affect delivery to assist in planning efforts.
5. Work with region and libraries to prepare “disaster” plan for emergencies.

Responsibilities of the Massachusetts Board of Library Commissioners

The MBLC shall:

1. Identify statewide issues for libraries regarding delivery.
2. Bring people together from across the state to discuss issues, search for solutions, and identify funding sources.
3. Make legislators and the people of Massachusetts aware of the importance and necessity for continuing and expanding sources of funding for delivery services.
4. Provide on-going state and federal grant opportunities to improve regional and library network delivery operations.
5. Work with the legislature to increase non-resident lending reimbursement and reinstate the net-lender program.

Responsibilities of Delivery Vendors

The delivery vendor shall:

1. Meet the conditions of the contract under which they have been hired.
2. Designate a liaison to the regional library system.
3. Communicate with the Regional office as needed.
4. Train sorting and delivery staff on correct procedures.
5. Monitor staff for sorting and delivery route errors.
6. Cooperate with the regional library in bringing about public awareness of the regional library's services by having signs on the delivery vehicles identifying the regional library.
7. Work with region to prepare "disaster" plan for emergencies.

Committee Recommendation on Automation:

That the Board of Library Commissioners encourages grant proposals from regional library systems and library networks that demonstrate or implement the use of automation to improve the efficiency or reduce the cost of delivery.