It’s in the Mail: Improving the Physical Delivery of Library Resources

• Introduction
  – Todd Carpenter, Managing Director, NISO

• Keynote Presentation
  – Lori Bowen Ayre, Library Technology Consultant and Project Manager, The Galecia Group

• NISO Physical Delivery of Library Resources Working Group
  – Diana Sachs-Silveira, Co-chair and Virtual Reference Manager, Tampa Bay Library Consortium

• Signed, Sealed, and Delivered: Physical Delivery of Library Material
  – Scherelene Schatz, JerseyCat and JerseyClicks Project Manager, New Jersey State Library

Library Delivery Demand Has Been Increasing Steadily

• Sarah Long, North Suburban Library System: “500% increase in last 10 years”
• More typical: 15-20% increase per year since introducing patron-initiated request service

Factors Influencing Library Delivery: The Upward Spiral

• Library Software
  • Patron initiated requests
  • Better discovery interfaces
  • More union catalogs

• Customer Expectations
  • Fast turnaround
  • Bestsellers
  • Blockbusters
  • Classics
  • Niche
  • Educational
  • ...and personalized service too
Factors Influencing Library Delivery: The Upward Spiral

- Library Software
- Customer Expectations
- Service Goals of Libraries
  - Compete with Google
  - Compete with Amazon
  - Compete with Netflix
  - ....and be the local community hub, too

Factors Influencing Library Delivery Volume: The Dampening Effect

- Online availability of more stuff
- Better portable devices
- Easing of DRM restrictions
  - Downloadable movies
  - eBooks
  - Downloadable audiobooks
  - iPads

How Delivery Works

- UPS/USPS
- Local Courier
- Software Determines Delivery Patterns
- Worldcat
- Shared ILS

Characteristics of Library Courier Systems

- Company is local (or a local franchise of a larger regional courier)
- Drivers are contractors who own their own trucks
- Sorting is manual (and may be bin-level only)
- No tracking of material possible
- Sort destination relies on labels applied by staff

Library Staff Workload Increases as Delivery Volume Increases

- Outgoing material must be:
  - labeled
  - routing slip filled out
  - rubber-banded
  - DVDs put in jiffy packs
  - pre-sorted to location
- Incoming material must be:
  - removed from bin
  - unpackaged
  - checked-in item by item
Libraries Haven't Changed How They Do Delivery

They just do more of the same....
- more routing slips
- more trucks
- more stacks of bins
- more people manually sorting

What is/will Change the Delivery Landscape

- More collaboration; more sharing
- Adoption of automated materials handling technology
- RFID
- Changes in how library space and library staff are used

More Collaboration & Sharing

- Open source software is creating opportunities for libraries to work together and control their workflow
- Open Source ILSs:
  - Evergreen: Georgia PINES, Evergreen Indiana, Michigan Evergreen
  - Koha: Kansas (NEKLS), Wisconsin (SCLS), Massachusetts (Masscat), Vermont (VOKAL)
- Coming: Fulfillment
  - ILS-agnostic resource-sharing software
  - Reduced staff workload without shared ILS

Automated Materials Handling

- Self check-in with sorting
  - eliminates handling of ready-to-shelve returns
  - separates items to send to other libraries
- Central sorters
  - sort at 1500 per person hour instead of 400
  - huge reduction in work effort in libraries
    - provide batch check-in of delivery totes
    - eliminate presorting, routing slips, rubber bands
- RFID
  - Standards are coming along for HF tags
  - Interoperability across vendor products more likely
  - More libraries moving to RFID will help reduce tag costs
  - New data models support delivery better
    - use tag, instead of ILS connection to sort
    - track deliveries
  - UHF may be the spoiler
    - Cheaper
    - Longer read range but more “tune-able” than HF tags

Library Space and Staff

- Fewer book shelves in favor of more
  - program, community meeting spaces
  - flexible and fun kids areas
  - click-free, quiet reading areas
  - group work rooms
- Embedding staff
  - out on the floor in public spaces
  - out in the community
  - in computer labs
Predictions
Delivery volume will continue to increase because of the trend toward increased sharing of resources and the much-improved (and improving) discovery and resource-sharing software.

Predictions
The dampening effect of digital media will only serve to slow down the increase in delivery volume and will primarily only affect DVDs and hot book titles.

Predictions
Library material will increasingly be stored outside of public areas where storage and extraction can be optimized for better retrieval on demand.

Predictions
Materials handling automation will become standard components of library operations because it dramatically reduces materials handling workload for staff and improves service to patrons.

Predictions
Automated sorting will move in the sharing and collaborative direction especially as the sort operation relies less and less on ILS connectivity.

What Won’t Work
* Choosing to “go it alone”
  • one library’s holdings is not enough to satisfy today’s library customers
* Continuing to use staff for materials’ handling functions instead of automation
  • staff are too slow and prone to injury
* Thinking library logistics are different from every other industry
  • standards, professionalism, and technology need to replace the home-grown approach
Library Delivery Affirmation

Library physical delivery will...

- Be composed of shared, automated, sort centers
  aka “Distribution Centers”
  that do not rely on ILS connectivity
- Be supported by
  professional regional couriers
  with employee-drivers and company owned vehicles
- Provide seamless delivery across library systems
  for library-to-library, and possibly
  library-to-patron
  library materials fulfillment services

NISO WORKING GROUP:
PHYSICAL DELIVERY OF
LIBRARY RESOURCES

Diana Silveira, Co-Chair
Tampa Bay Library Consortium
May 12, 2010

Charter

1. The increased volume and costs of library delivery is creating a demand for more information about how to run efficient and effective delivery operations. The Physical Delivery for Library Resources Working Group (under the oversight of NISO’s Discovery to Delivery Topic Committee) is charged with developing a Recommended Practice to help facilitate library resource sharing.

Who are we?

- Co-chairs:
  - Valerie Horton, Executive Director, Colorado Library Consortium
  - Diana Silveira, Virtual Reference Manager, Tampa Bay Library Consortium
  - Ken Bartholomew, American Courier
  - Julie Blume Nye, OCLC Online Computer Library Center
  - Chaichin Chen, State of Rhode Island, Office of Library & Information Services
  - Kathy Drozd, MINITEX Library Information Network
  - Poul Erlandsen, The Royal Library
  - Michelle Foss Leonard, University of Florida
  - Bonnie Juergens, Amigos Library Services
  - Jennifer Kuehn, Ohio State University Libraries
  - Greg Pronovitz, Northeast Massachusetts Regional Library System
  - Franca Rosen, Jefferson County Public Library System

Project Timeline

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Timeline</th>
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<tbody>
<tr>
<td>Appointment of working group</td>
<td>November 2009</td>
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<tr>
<td>Completion of information gathering, including:</td>
<td>November 2009 – February 2010</td>
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<td>• development of bibliography of existing information re physical delivery of library resources (to be made available on the NISO website)</td>
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<tr>
<td>• finalization of document outline</td>
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<tr>
<td>Completion of initial draft recommended practices document</td>
<td>February 2010 – August 2010</td>
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<tr>
<td>Comment Period</td>
<td>September 2010 – March 2011</td>
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<tr>
<td>Completion of final recommended practices document</td>
<td>May 2011</td>
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Current Status

- Charge: Create recommended standards to improve performance and reduce cost of physical delivery.
- Focus: Methods for improving performance and reducing the cost of moving materials between by a library that owns an item and another library whose patron wants to use the item.
- Scope: External delivery of items between separately administered libraries.
Delivery of Physical Resources Work Flow

1. A patron wants an item not held in his or her home branch
2. Through either a mediated or a self-conducted search, the patron identifies the desired item as being held in another library
3. Once the desired item is located, an electronic request is made to the lending library
4. The lending library ships the desired item via some delivery method to the requesting library (or in some cases directly to the patron)
5. The patron’s home branch checks the item out to the patron
6. The patron returns the item to the requesting library
7. The requesting library returns the item to the home library

Recommendation Topics

1. The Physical Move
   - Packaging, labeling, automation and receiving the item
2. Connections between separate administrative delivery services
3. International Delivery
   - Unique issues: customs, insurance, packaging, labeling,
4. Direct Delivery to Patrons
   - Methods
5. Management Considerations
   - Governing structure, roles, relationships, policies, damaged and lost policies, record keeping guidelines, contracts, communication, evaluation, fees
6. Reducing Deliveries
   - Why, how?
Reasons to Offer Home Delivery

- Customers expect fast and efficient service
- Customers don’t want to wait
- Customers want convenience

Orange County Library System

- MAYL – Materials Access from Your Library
- Home delivery began in 1974
- First complete year – 9,000 items were mailed to library customers
- By 1990, 18,000 items per month were mailed to library customers.
- In 2008 – 800,000 items were circulated and delivered.

Topeka and Shawnee County

- Began in the mid-1980’s
- Home delivery vs. a new parking lot
- 2007 – 153,438 items mailed = 4.2% of total circulation
- Customers are responsible for cost of return

New Jersey Libraries

- Burlington County Library
- Gloucester County Library
- Princeton Public Library
Burlington County Library

- Total Circulation in 2009: 27,886
  - 73% of the items lent are books
  - 20% of the items lent are DVDs and VHS tapes
  - 6% of the items lent are audio
- Circulation has grown to over 3,000 items a month.

Workflow at Burlington County

- Patron enters hold via online system
- Item is received at customer's home
- Items are retrieved from stacks
- Check out materials to customer
- Package item and use special software to print mailing label and postage

Comments by Library Customers

- "The library in a bag program has been awesome for me. I get to read the books I want and watch fairly new movies too."
- "I enjoy using this service and appreciate that it is available. Very convenient."
- "This service is absolutely outstanding. Efficient, timely, organized system. What a blessing."
Gloucester County Library

- MailLit began in June 2008
- Total Circulation in 2009: 8,626
  - 76% of the items lent are books
  - 16% of the items lent are DVD's and VHS tapes
  - 7% of the items lent are audio
- Circulation has grown to over 600 items a month.

Comments by Library Customers

- "I love MailLit—hope you can expand it to ILLs. Thank you!!"
- "This is the best thing! It is one less errand I have to run and it makes me read more. My kids are also reading more. Thanks!!"
- "I love this service. Finally a good idea, executed right."

Princeton Public Library

- Library by Mail began in August 2009.
- Total Circulation since August 2009: 536
- Total Bags Mailed: 424
- Total Library Customers: 250
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Thank you

All questions will be posted with presenter answers on the NISO website following the webinar:

www.niso.org/news/events/2010/resourcesharing