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SPECIAL ISSUE: RESOURCE SHARING

USING RESOURCE  
SHARING STANDARDS  
IN THE ORBIS CASCADE  
ALLIANCE CONSORTIAL  
BORROWING SYSTEM

ROUNDUP OF RESOURCE  
SHARING TOOLS & PROJECTS

FUNDING MODELS  
FOR COOPERATIVE  
INFORMATION RESOURCES  
AND REPOSITORIES

NISO PHYSICAL DELIVERY OF  
RESOURCES WORKING GROUP



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## Physical Delivery of Library Resources Working Group

In July 2009, NISO's Discovery to Delivery Topic Committee approved a new project proposal to develop a Recommended Practice for the Physical Delivery of Library Resources. The submitted proposal provided evidence that even in this digital age of information library patron borrowing and lending was skyrocketing:

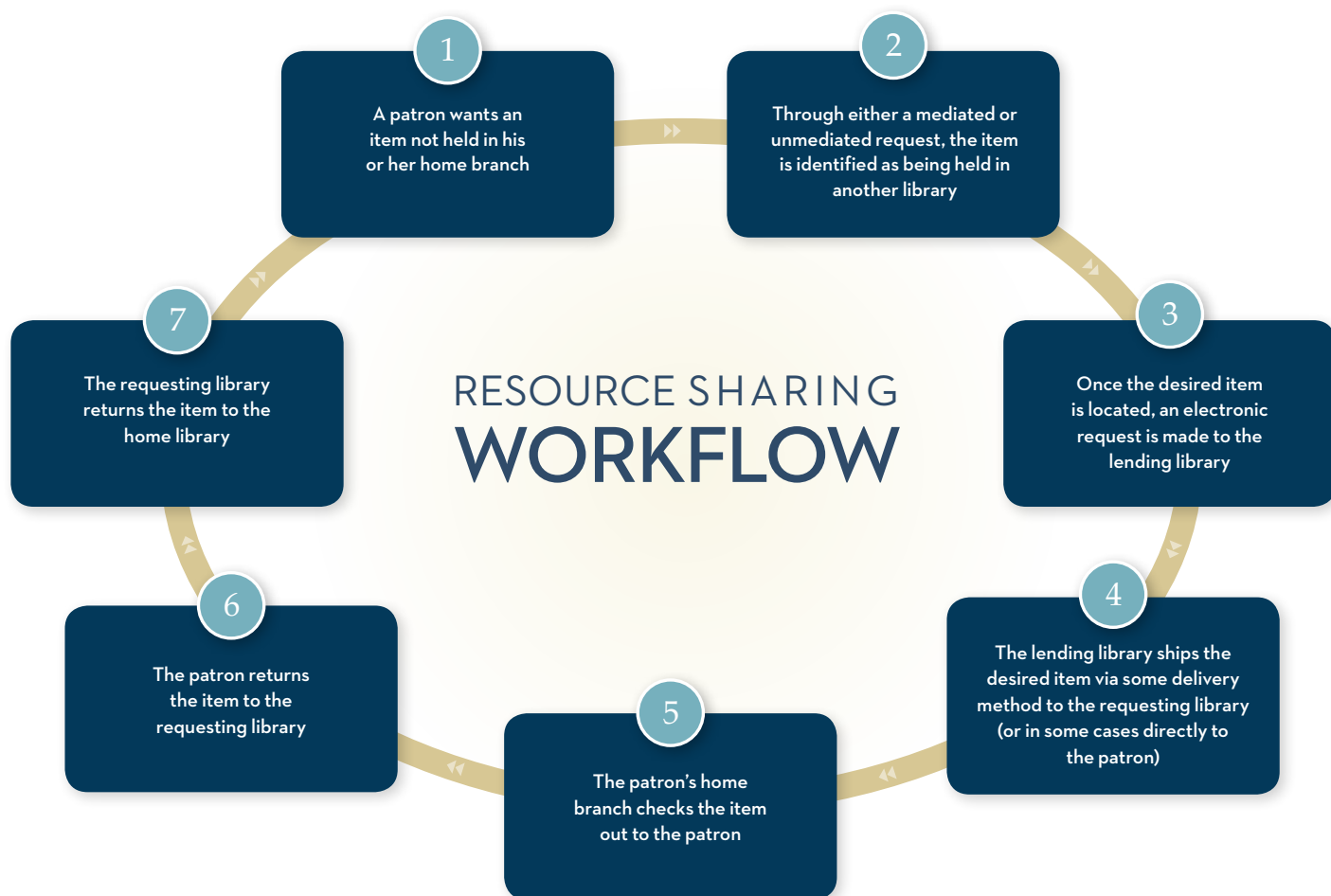
- **A Library Research Service fact sheet** shows that for nationwide ILL borrowing, returnable rates are up 40.8% between 2000 and 2006, and in Colorado that increase is 107.4%.
- **A Primary Research Group study** found that 77% of academic libraries participate in state or provincial resource sharing networks above and beyond the 10,000,000 interlibrary loan (ILL) transactions that OCLC annually processes.
- **The same Primary Research Group study** found that the mean annual amount paid by individual academic libraries for delivery was \$6,856, with some libraries paying as high as \$60,000.
- **A 2008 survey** published in *Moving Materials: Physical Delivery in Libraries* found that library delivery systems are moving millions of items a year. One system reported 15 million deliveries.
- **A Library Research Service 2008 survey** showed that library delivery systems can cost as much as \$2,250,000 depending on the amount of materials moved.

The rapid growth in resource sharing is causing similar growth in both the use and costs of delivery systems. At \$4.00 per USPS ILL transaction, we estimated that American libraries are paying over \$25,000,000 to ship interlibrary loan items by mail each year.

These growing costs at the same time that libraries are experiencing budget difficulties has increased the pressure to become more efficient and effective in the resource sharing of physical materials. Additionally many libraries, consortiums, and vendors had developed their systems and procedures for managing delivery independently, which was creating more difficulties as libraries began trying to interoperate with other delivery systems to expand resource sharing.

Three different groups that had been formed to share knowledge about delivery expressed interest in working with NISO:

- 1 **Moving Mountains Project** - an ad hoc group with a steering committee of nine library delivery experts
- 2 **Rethinking Resource Sharing's Physical Delivery Committee** - a group of fourteen library delivery experts focusing on home delivery, international delivery, and the impact of digitization on delivery services
- 3 **American Library Association's Association of Specialized Cooperative Library Agencies (ASCLA), Interlibrary Cooperation & Networking Section** - sponsors a Physical Delivery Discussion Group that meets at every ALA Annual and Midwinter Conference and regularly sponsors programs at ALA conferences on delivery



# RESOURCE SHARING WORKFLOW

The NISO Physical Delivery Working Group was charged to create recommended standards to improve performance and reduce cost of moving materials between a library that owns an item and another library whose patron wants to use the item. The variety of organizations represented by the Working Group members (see sidebar) has ensured that different perspectives from vendors, colleges, state delivery, consortium delivery, etc. are considered. The collaboration among the members has really enriched the process of developing the recommended practice.

## Resource Sharing Workflow

Resource sharing begins with a patron wanting an item that is not available within the patron's specific library or branch and ends with the item being returned to the lending library. The specific steps in the workflow are shown in Figure 1.

The Physical Delivery Working Group's recommended practice is focused on the delivery of the items to the borrowing library (#4 in Figure 1) and its return to the lending library (#7). While our focus is on the delivery piece in its many aspects, the entire system impacts how the delivery takes place. Within these recommended practices, we are making several suggestions about the other steps in the patron request process to ensure the delivery piece works optimally.

## Recommended Practice

The scope of the recommended practice is limited to the external delivery of items between separately administered libraries, although the recommendations are expected to be of value for branches of a single library system as well. External delivery can be based on consortia delivery within a shared system, region, state, or country. It can also be items moving through a standard interlibrary loan request.

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Recommendations are included on the following topics:

➤ **Physical move**

- » Identification through production of a pick slip, routing slip, or combination of both.
- » Item packaging, labeling, and transportation containers
- » Destination designation and label quality
- » Connecting a label to a packaged item
- » Transport container requirements
- » Package tracking
- » Environmental considerations
- » Delivery facilities
- » Automated systems

➤ **Connections between separate administrative services**

- » International delivery
- » Direct delivery to patrons
- » Managing a courier system
- » Reducing deliveries

- As an example, the recommendation on item packaging requirements is based on the “minimal use” rule, which means the goal is to keep the packaging to a minimum and to handle the item as little as possible. Specifically:
  - » Packaging material should be able to be reused multiple, even 100s or 1000s of times. At times, disposable packing may be required; in those circumstances we recommend using the smallest size of packaging material available, and using packaging material that is made of recycled components. The less packaging material used, the less repetitive the work and the greener the process.
  - » Due to labor, cost, and environmental considerations, we do not recommend individual wrapping of items or use of bubble envelopes. (However, see next point about rare or fragile items.) Padded envelopes should not be sealed, stapled, taped, or otherwise closed. This will allow the envelope to be reused more times.
  - » Packaging needs to be appropriate to the fragileness and rarity of the item. There will be additional packaging as the item’s value and fragility increases. We also recognize that special collections and archival materials have their

TABLE 1: Item Packaging Preferences

PACKAGING	PRODUCT EXAMPLES	DIRECT COST PER UNIT	WORK FLOW IMPACT	ENVIRONMENTAL IMPACT*
UNPACKAGED	Placing items in transport containers with no labeling or packaging.	none	low	least impact
RUBBER BANDED	Alliance® Pale Crepe Gold™ Rubber Bands In 1 Lb. Box, #117B, 7" x 1/8", Box Of 315	low	minimal	low impact
ENCLOSED IN REUSABLE PLASTIC OR NYLON BAGS	Multiple vendor options	high	minimal	low impact
REUSABLE JIFFY BAGS	Jiffy Rigi Bag® Recycled Mailers, 14 1/4" x 18 1/2", Kraft, Pack Of 75	medium	minimal	high impact
PAPER BANDED		varies	high	medium impact
SINGLE USE PACKAGING		varies	minimal	not recommended

\* Scale: Low = less than \$1; Medium = \$2-\$4; High = \$4 and above

own unique packaging requirements, but those requirements are outside of the scope of this document.

- » The most effective way to transport CDs and DVDs is in flexible, durable plastic cases, so that extra protective packaging is not necessary. If the case is not a durable type, you may place it in a protective envelope.

Table 1 indicates the recommended order of preferences for item packaging, with the first item being the most preferred.

Among the recommendations for transport container requirements are ergonomic considerations such as: "Care should be taken to keep weight limits low to reduce lifting injuries. Lifting can be thought of as an equation that considers how much a healthy worker can lift over an 8-hour period without increased risk of injury."

The recommended practice also includes suggestions on ways to reduce the volume and/or costs of deliveries. These include: using the closest available copy (geographically), selecting available copy based on delivery route, substituting electronic materials, using floating collections (keeping items at the return location), delivery route clustering (aka transportation hold queue clustering), reserving high-demand titles for local use, hold queue filling based on patron location (rather than date of request).

## Next Steps

The group anticipates having the Recommended Practice available for public review and comment in early 2011.

The process has been slow and painful but worthwhile. While most other working groups are focused on the presumably more exciting world of digital information, our group has been researching types of transportation containers, label adhesives, and automated materials handling systems. The volume of loan requests is evidence that the world is still a long way away from being all digital and patrons still depend on their local library to find and supply physical copies of materials, even when not owned by the patron's own library. This recommended practice should help libraries to continue to provide that service in both an efficient and cost-effective manner.

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### ASLCA ICAN

[www.ala.org/ala/mgrps/divs/ascla/asclaourassoc/asclasections/ican/ican.cfm](http://www.ala.org/ala/mgrps/divs/ascla/asclaourassoc/asclasections/ican/ican.cfm)

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### Moving Materials: Physical Delivery in Libraries. ALA Editions, 2010.

[www.alastore.ala.org/detail.aspx?ID=3089](http://www.alastore.ala.org/detail.aspx?ID=3089)

### Moving Mountains Project

[clicweb.org/movingmountains/](http://clicweb.org/movingmountains/)

### Physical Delivery Working Group webpage

[www.niso.org/workrooms/physdel](http://www.niso.org/workrooms/physdel)

### Rethinking Resource Sharing Physical Delivery Committee

[www.rethinkingresourcesharing.org/delivery.html](http://www.rethinkingresourcesharing.org/delivery.html)



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