

# **Interlibrary Loan & Courier Delivery Service Manual**

## **2009-2010**

Committee:

Jan Brooks, Johnson County Community College Library

Rhonda Brown, Springfield-Greene County Library

Susan Burton, KCMLIN

Cyndi Chappell, Johnson County Library

Linda Cox, Longview Community College Library

Brenda Hunnicutt, Kansas City Public Library

Candy Johnson, Emporia State University Library

Patti Myers, Kansas City Kansas Public Library

Ruth Rodden, Topeka & Shawnee County Library

Joyce Sickel, Shook, Hardy and Bacon Library

Linda Tarantino, Mid-Continent Public Library

Cindy Thompson, UMKC Library

<b>TABLE OF CONTENTS</b>	<b>2</b>
<b>Introduction</b>	<b>3</b>
<b>Committee</b>	<b>3</b>
<b>Interlibrary Loan Policy</b>	<b>3-4</b>
<b>Interlibrary Loan Procedure</b>	<b>4-5</b>
<b>Requesting Materials Through Interlibrary Loan</b>	<b>5-6</b>
<b>KCMLIN's WEB-ILL</b>	<b>6</b>
<b>Guidelines for Statistical Reporting</b>	<b>6-7</b>
<b>Courier Delivery Service</b>	<b>7</b>
- <b>Definition</b>	<b>7</b>
- <b>Acceptable Materials</b>	<b>7-8</b>
- <b>Supplies</b>	<b>8</b>
- <b>Closings</b>	<b>8</b>
<b>Reporting of Problems</b>	<b>8-9</b>
- <b>Missed scheduled delivery</b>	<b>8</b>
- <b>Undelivered materials</b>	<b>9</b>
- <b>Damaged materials</b>	<b>9</b>
<b>Packaging/Addressing</b>	<b>9-11</b>
- <b>Bags/Boxes/Tubs</b>	<b>9</b>
- <b>Proper addressing</b>	<b>10</b>
- <b>Mailing Labels</b>	<b>10-11</b>
- <b>Bar codes</b>	<b>11</b>
<b>Library Drop Site Responsibilities</b>	<b>11</b>
<b>Get Connected Library Procedures</b>	<b>11-12</b>
<b>Appendix A: Interlibrary Loan Lending Agreement</b>	<b>13-14</b>
<b>Appendix B: Libraries Participating in Lending Agreement</b>	<b>15</b>
<b>Appendix C: KCMLIN WEB-ILL Instructions</b>	<b>16</b>

## **INTRODUCTION**

The Kansas City Metropolitan Library & Information Network (KCMLIN) operates an interlibrary loan and courier delivery service for KCMLIN member institutions.

As in any cooperative venture, the success of KCMLIN's interlibrary loan and courier delivery service is highly dependent on the goodwill and cooperative spirit of the participants. For this reason, it is most important that members do not impose unnecessarily on the staff time of other members. Such imposition can be eliminated by the prompt return of borrowed materials, the maintenance of accurate records of each library's own transactions, and careful attention to the accuracy of requests submitted.

Policy statements, procedures, lists and directions necessary to participate in KCMLIN's interlibrary loan and courier delivery program are contained in the following pages. As information is updated, revised pages will be posted on the web and notification sent to members

## **COMMITTEE**

The standard operating policies and procedures are developed by an ILL/Courier Advisory Committee and adopted by the KCMLIN Council. For 2009-2010, the committee members include:

Jan Brooks, Johnson County Community College Library  
Rhonda Brown, Springfield-Greene County Library  
Susan Burton, KCMLIN  
Cyndi Chappell, Johnson County Library  
Linda Cox, Longview Community College Library  
Brenda Hunnicutt, Kansas City Public Library  
Candy Johnson, Emporia State University Library  
Patti Myers, Kansas City Kansas Public Library  
Joyce Sickel, Shook Hardy & Bacon Library  
Cindy Thompson, UMKC Library  
Linda Tarantino, Mid-Continent Public Library

## **INTERLIBRARY LOAN POLICY**

Adopted 11/19/80  
Revisions 2/6/99, 1/9/08, 7/09

Policies stated herein are meant to encourage a liberal lending of materials within the network region, recognizing that the primary needs of ones own clientele come first. Interlibrary borrowing is not a substitute for responsible development of a library collection. This policy affects only those transactions

of a library to library nature. Reciprocal borrowing arrangements involving direct patron access are not described.

### Scope

Any material needed for the purpose of information, instruction, recreation, research, or study may be requested for loan or in photocopy from KCMLIN network libraries. The lending library has the privilege of determining whether an item should be lent. Materials of all types may be requested within the system.

### **INTERLIBRARY LOAN PROCEDURES**

By participating in the KCMLIN/Get Connected interlibrary loan courier and delivery service members agree to abide by the following:

Overdues: members are requested to return borrowed items promptly. Lending libraries should send notices directly to the borrowing library.

Renewals: Arrangements to extend borrowing periods should be made directly with the lending library.

Lost or Missing Materials: Notify the sending library and report to KCMLIN as soon as possible so that a search can be made.

Replacing Lost or Damaged Items: The safety of the items borrowed and transported on the KCMLIN internal courier service are the responsibility of the borrowing library from the time the materials leave the lending library until it is received back by the lending library. If your library receives an article in damaged condition, please fill out a “KCMLIN Condition Report”. These are available from the KCMLIN office. You are responsible for the costs associated with the replacement of the lost or damaged items.

If your library is moving materials through the 1<sup>st</sup> Choice connecting courier delivery service, a lost or damage claim will be submitted after a thorough search has been done. If the item has only been moved by 1<sup>st</sup> Choice couriers, the costs associated with the replacement of the lost or damaged items will be 1<sup>st</sup> Choices responsibility.

Use of Routing Slips or Book Bands: Use a routing slip for all items you lend to other members. KCMLIN will provide routing slips if your library doesn't have one. Fill in the necessary information including the name of your library. All materials circulating in the network must show clear ownership information.

The borrowing library is responsible for filling in the “Date Returned” section of the routing slip. The date to be used should be the date that the item is given to the courier for returning to the lending library.

If the item has been renewed and has a different due date from the one specified, the borrowing library should add the renewal date arranged with the lending library.

For additional routing slips contact the KCMLIN office 816-521-7257 or Beth Willis [bethwills@kcmlin.org](mailto:bethwills@kcmlin.org).

### **REQUESTING MATERIALS THROUGH INTERLIBRARY LOAN**

Book loan requests: may be done through KCMLIN’s WEB-ILL system, OCLC or other methods at the discretion of the lending library. Information including the title, author(s), or editor(s), edition, date of publication, verification statement, known locations and known call numbers are needed to complete the loan application form.

Photocopy or article requests: may be done through KCMLIN’s WEB-ILL system, OCLC or other methods at the discretion of the lending library. Information including the title of the serial (full title, no abbreviations except “J” for journal), date, volume and issue number, inclusive pages to be copied, author of article, title of article and maximum number of pages to be photocopied should be supplied with the serial request form.

Arrangements can be made for the fax or electronic transmission of photocopies.

Conditions of the loan: due dates shall be specified by the lending library. The borrowing library will honor any limitations on use imposed by the lending library. Requests for renewal should be made prior to the due date and made directly to the lending library. All requests are to be for “known items” subject requests will not be accepted.

Verification: Efforts to verify requests using the on-line catalog on KCMLIN’s WEB-ILL is required. If verification is not possible, the statement, “cannot verify” must accompany the request.

#### Fee Assessment:

Please see “Lending Agreement” in Appendix A

The borrowing library accepts the responsibility for any postage, photocopy, or other costs assessed by the lending library. For the sake of efficiency, the lending library is encouraged to absorb these costs. No overdue fines will be assessed on interlibrary loan materials.

Charges for photocopies are restricted to no more than \$.20 per exposure (adopted by KCMLIN Council, January 27, 1988).

Payments should be mailed directly to the supplying library. Payments must be accompanied by the name of the paying library, the amount and identifying information of the items covered.

**KCMLIN's WEB-ILL – Only used by libraries without other ordering mechanisms such as OCLC, Show Me The World, etc.**

Please see Appendix C for step-by-step instructions for utilizing.

KCMLIN has developed a WEB-ILL searching and ordering on-line system. KCMLIN members have the opportunity to utilize this system.

KCMLIN members have access to area catalogs through the WEB-ILL. Currently the following catalogs are on-line.

Children's Mercy Hospital Library  
DeVry University Library  
Kansas City Kansas Public Library  
Kansas City Library Consortia  
Kansas City University of Medicine & Biosciences Library  
Kansas Library Consortia  
Johnson County Community College Library  
Johnson County Library  
Mid-Continent Public Library  
MOBIUS  
Ranken  
Topeka & Shawnee County Public Library

**GUIDELINES FOR STATISTICAL REPORTING**

Effective July 1, 2007, statistics will be kept on ALL OUTGOING courier items. This means each and every item that leaves your library whether it is a borrowed, loaned or reciprocal return is counted.

Effective July 1, 2009, each library is required to report their monthly statistics online. Statistics for the preceding month must be reported by the 10<sup>th</sup> of the following month. To report your statistics go to:

- <http://kcmlin.org/courstats/courierstatistics.php5>
- Select your library from the drop down menu
- Use the password that has been sent to you: if you do not remember your password contact [bethwillis@kcmlin.org](mailto:bethwillis@kcmlin.org).
- Your previous month total will appear, plus it will show you the month you are currently entering for.

- If you are entering your items as individual pieces, just enter your figure on the first line that reads: **INDIVIDUAL ITEMS SENT ON THE COURIER (ALL OTHER ITEMS SENT IN MOBIUS BAGS, MANILA ENVELOPES/BOXES NEED TO BE COUNTED AS EACH INDIVIDUAL ITEM SENT AS ONE ITEM)**
- Some libraries are entering their items by courier tubs and bags. If your library is doing this, enter the number of tubs and bags and then enter any other miscellaneous in the individual items column.

For KCMLIN and Get Connected members, this includes counting all items sent to KCMLIN, Get Connected and/or MOBIUS libraries. Everything that leaves your library door should be included in the count.

KCMLIN and Get Connected members who are also members of MOBIUS should count all items going out their library door that are going to all libraries other than other MOBIUS Academic Libraries. Public Libraries such as Springfield-Greene and Missouri River Regional are on the KCMLIN/Get Connected courier service and should be counted as an item going out on the KCMLIN/Get Connected courier service.

Statistics are kept for a number of reasons including:

- justification or making a case
- contract negotiations
- political
- need vs demand
- demographics
- inventory
- contract penalties and incentives

## **COURIER DELIVERY SERVICE**

### **Definition**

KCMLIN provides courier delivery service through a variety of mechanisms.

1. KCMLIN operates 4 courier vans owned by the network and employees couriers to operate the vans. This is generally in the KC Metropolitan area.
2. KCMLIN contracts with 1<sup>st</sup> Choice to delivery MOBIUS items via the KCMLIN courier service in the Kansas City Metropolitan area.
3. KCMLIN contracts with 1<sup>st</sup> Choice to provide Get Connected service to areas outside the KC Metropolitan area throughout the states of Missouri and Kansas.
4. KCMLIN contracts with Greyhound to provide Get Connected service to libraries in the State of Colorado.

4. KCMLIN has cooperative agreements with Johnson County Library, Kansas City Kansas Public Library and Mid-Continent Public Library to provide connecting courier services.

### **Acceptable Materials**

KCMLIN/Get Connected member libraries may send library related materials as well as items requested on interlibrary loan on the courier service. Additional charges will be imposed for non-library related materials. An example of this would be sending cases of college class schedules, boxes of discarded items, etc. Contact the KCMLIN office (816) 521-7257 for a quote on delivery service of these items.

Materials that may be shipped via the courier service include:

- \* “returnables” such as books, sound recordings, microforms and videos
- \* “non-returnables” such as photocopies of journal articles
- \* communications and other documents

### **Supplies**

Bags: KCMLIN provides nylon bags. You will receive an initial supply when signing up. If you begin running short, contact the KCMLIN office [bethwillis@kcmlin.org](mailto:bethwillis@kcmlin.org) or [marypuhr@kcmlin.org](mailto:marypuhr@kcmlin.org) and an additional supply will be sent. If you have a surplus of bags, please send back to the KCMLIN office for redistribution.

Courier Pick Up Forms: Each time the courier comes he will sign in and out on a courier pick up form. Please have these available and easy for him to sign. There are instructions for filling this out later in the manual. Please contact [bethwillis@kcmlin.org](mailto:bethwillis@kcmlin.org) if you need additional courier pick up forms.

Shipping labels: Shipping labels can be printed from the KCMLIN web site at: <http://www.kcmlin.org/>. These are the ONLY labels to be used. Please do not create your own labels.

### **Closings**

The dropsite is responsible for informing KCMLIN if they do not need courier service for a protracted period of time (for example, due to library closure for construction, disaster, etc.).

Please send the KCMLIN Administrative Office notice of any days you will be closed. This saves the courier from making unnecessary trips. Schools and academic libraries should notify KCMLIN of spring breaks, Christmas/Thanksgiving breaks and summer break schedules.

## **Reporting of Problems**

### **Missed Scheduled Delivery**

The KCMLIN/Get Connected courier should deliver/pickup every day you have a scheduled delivery. Library sites can choose between a one day per week and a five day per week delivery schedule. If the scheduled stop is not made please complete the online report form immediately:

<http://kcmlin.org/problem/reqform.php5>

In the event of inclement weather, the couriers will often run a later shift. The KCMLIN office will always try to send an email out confirming this. In the rare occasion the courier cannot run due to inclement weather, an email will be sent to libraries.

### **Undelivered Materials**

If expected items are not received within four days after routing is reported to you, please contact the KCMLIN office 816-521-7257 or [bethwillis@kcmlin.org](mailto:bethwillis@kcmlin.org) so an email can be sent to the rest of the ILL department's to search for the missing item. Prompt inquiry on missing materials will increase the chances of successfully locating them.

### **Damaged Materials**

If damage occurs to an item, please fill out an online report form immediately:

<http://kcmlin.org/problem/reqform.php5>

## **PACKAGING AND ADDRESSING**

Items shipped via the KCMLIN/Get Connected courier service must be packaged and labeled according to the following instructions.

### **Bags/Boxes/Tubs**

All KCMLIN/Get Connected materials should be moved between libraries utilizing the nylon bags, boxes, tubs or manila envelopes. The nylon bags and tubs are preferable.

Use a separate delivery bag/tub/envelope/box for each KCMLIN/Get Connected/MOBIUS delivery site. Use the Get Connected labeling system which includes all deliverable sites at: <http://www.kcmlin.org/labels/>.

If multiple items are being shipped to a single drop site, they should be packaged together (for example, in a courier bag, larger padded envelope, or small carton or tub).

Item identification: Each item being shipped should include a copy of the interlibrary loan request or sufficient information to identify the item.

### **Zippered nylon courier bags**

Courier delivery bags come in a variety of colors. Most generally you will find these in red, blue, green and black. All of these bags are interchangeable and can be used on your KCMLIN/Get Connected Service. These bags include:

**Red and Blue Nylon Get Connected bags**

**Green KCLC Nylon Bags**

**Black Nylon MOBIUS bags**

Fill the bags without placing strain on the seams and/or the zipper. Place a security tag through the hole and the zipper in order to secure your items for shipment.

### **Tubs**

Some libraries will utilize tubs to send materials back and forth through the KCMLIN courier. Only 10-gallon or 14-gallon Rubbermaid tubs can be used for this. If the tubs begin to take up too much room in the KCMLIN courier van, the library will be notified that they must return to nylon bags used by the rest of the network members.

### **Envelopes/Boxes**

A variety of sizes and types of envelopes and/or boxes may be utilized to on the KCMLIN/Get Connected courier. Make sure to completely seal the box or envelope, provide an appropriate address label and if routing outside the KC Metro area a 1<sup>st</sup> Choice delivery UPC label must be affixed as well. Please do not send any envelope smaller than 8" x 11". If you are sending items in a No. 10 business envelope, you will need to put this inside of a larger envelope for shipment.

### **Proper Addressing**

For all KCMLIN/Get Connected members moving things in or out of the Kansas City Metropolitan area, please use the labeling system found on the KCMLIN web site at: <http://www.kcmlin.org/labels/>

These are the only labels that can be used for our connecting courier services.

For libraries moving items within the Kansas City Metropolitan region on the internal couriers, the couriers will NOT pick up any envelopes/bags/tubs without proper addressing. Use full library names as we have many libraries with similar names. If it is to go to a particular person at a library, put the library name first followed by (attention to) and the individual's name. Please do not use abbreviations, branch names, or OCLC library codes. Couriers cannot open bags or envelopes. Please do not ask them to open your bags or envelopes and combine items together. They are restricted to delivering your mail as sent to you from other member libraries.

### **Mailing Labels**

Label each package with an appropriate address label.

Courier bags: place a label in the clear window

Tubs: place a label in the clear window

Other packages: affix a label to the package. When using a previously used envelope or carton, remove or cover any visible shipping addresses from previous shipments.

KCMLIN/Get Connected/MOBIUS library mailing labels can be found at: <http://www.kcmlin.org/labels/>. The couriers CANNOT deliver books to libraries not on the list. The item will be returned to or left at the sending library.

If you are located in the KC Metro area and shipping items between libraries also located in the KC Metro area, you can use just the libraries full name on the bag, box/envelope. If it is to go to a specific individual, include "to the attention of" on the item as well.

### **Bar Codes**

All Get Connected and MOBIUS nylon bags should have a permanent 1<sup>st</sup> Choice barcode affixed to it. If it is missing or damaged, attach a new barcode from your supply or return the bag to the KCMLIN office via the courier.

Bar code other containers in the lower left of the mailing label from your supply.

All Get Connected/KCMLIN boxes have a permanent 1<sup>st</sup> Choice barcode affixed to them as well.

### **LIBRARY DROP SITE RESPONSIBILITIES**

1. All shipments must be prepared in advance. Drivers cannot wait while packaging, labeling or paperwork is completed. The dropsite is responsible for having packaged all materials for shipment and completing all paperwork required prior to their scheduled pickup/delivery time.
2. At pickup/delivery, a dropsite representative is responsible for checking the TO address on pieces received and refusing any packages not addressed to the dropsite.
3. The dropsite is responsible for immediately reporting problems, such as missed stops, a missing package or items missing from a package. Please report these on the online report form found at:

<http://kcmlin.org/problem/reqform.php5>

### **GET CONNECTED LIBRARY PROCEDURES**

Libraries that are serviced only by KCMLIN's contract courier service 1<sup>st</sup> Choice are required to follow the following procedures when recording items to go on the delivery service.

Each location will have their own 1<sup>st</sup> Choice pickup log book. This has a bar code on it and is identifiable to your particular site. When the courier does a pickup, he will record the bar code from this book as well as from the bags/containers being picked up. These items are then taken to a central location and scanned into the 1<sup>st</sup> Choice system.

PKG ID: write the UPC bar code label number (last 5 digits) from the bag  
DATE: fill in the date  
DELIVER TO: library name  
# OUT: fill in the number of items in the container  
TIME: driver will fill in time when picked up  
DRIVER'S SIGNATURE: driver will sign one line and draw a line down through all applicable items.

Pickup/delivery should be within a one-hour time from of the scheduled delivery time for your site. Please complete an online report form if there are consistent deviations from this: <http://kcmlin.org/problem/reqform.php5>

The driver will come to area you have designated on your profile and the pickup/drop off point.

## **APPENDIX A: INTERLIBRARY LOAN LENDING AGREEMENT**

Adopted 6/93

This agreement is voluntarily adopted by KCMLIN/Get Connected libraries to govern no-charge lending among KCMLIN libraries.

### Introduction

Interlibrary loan service is essential to the vitality of libraries of all types and sizes. It is one means of greatly expanding the range of materials available to users. Lending between libraries is in the public interest and should be encouraged. Interlibrary loan should serve as an adjunct to, not a substitute for, collection development.

### Definition

An interlibrary loan is a transaction in which a library material, or a copy of the material, is made available by one library to another upon request.

### Purpose

The purpose of this agreement is to promote the no-charge lending of library materials between libraries.

### Responsibility of Borrowing Libraries

Each library should provide the resources to meet the ordinary needs and interests of its primary clientele. Material requested under this agreement should be limited to those items that do not conform to the library's collection development policy for which there is no recurring demand.

The interlibrary loan staff of each library should be familiar with, and use, relevant interlibrary loan documents and aids.

Requested materials must be described as completely as possible following accepted bibliographic practice.

Borrowing libraries will make every effort to determine specific locations before sending requests.

Standard interlibrary loan formats should be used for all requests, regardless of the means of transmission. Requests may be transmitted by

WEB-ILL, OCLC, or any other method at the discretion of the lending library.

The safety of borrowed materials is the responsibility of the borrowing library from the time the materials leave the lending library until it is received back by the lending library.

The borrowing library and its users must comply with the conditions of the loan established by the lending library.

Participating libraries will make every effort to facilitate fair and equitable distribution of the interlibrary loan load.

#### Responsibility of Lending Library

The decision to lend materials is at the discretion of the lending library. Each library is encouraged to generously interpret its' own lending policy.

The lending library should process requests promptly. Conditions of the loan should be clearly stated. Materials should be packaged appropriately.

#### Lending of Library Materials

Libraries party to this agreement will not charge each other fees for handling interlibrary loan requests.

Signatories of this agreement are not to charge each other; however, they may charge non-signatories.

#### Requests for Photocopies

Participating libraries agree to provide 30 pages at no-charge per bibliographic citation when photocopying. Thereafter, there may be a charge per page of photocopy. Charges for articles in excess of 30 pages will not exceed \$.20 per page. Any delivery charge will be paid by the sending library.

Signatories to this agreement are not to charge each other; however, they may charge non-signatories.

#### Participants

See list of libraries participating in this "Lending Agreement" in Appendix B.

**APPENDIX B: LIBRARIES PARTICIPATING IN LENDING  
AGREEMENT**

## **APPENDIX C: KCMLIN WEB ILL INSTRUCTIONS**

Log on to the Internet.

Position your cursor in the location/address box on your browser and type the following to get to our website:

<http://www.kcmlin.org/kcill.htm>

Click on the lady reading a book. The username is kcmlin and the password is ill. All the different databases of KCMLIN members come up – you can search any of these for your selection. Once you have found the item you want, click on the computer that says “Books”. This takes you to the list of our member libraries.

SCROLL DOWN TO YOUR LIBRARY HERE and click on either books or serials. This will take you to the order form.

(Directions below are for ordering books – ordering serials are the same except for some of the titles of the lines.)

Date: type in the current date  
Request to: scroll down to the library you wish to order from  
Status: leave blank  
Title: type in the title  
Author: type in the author name (last name, first name)  
Published  
    Date: type in the publishing date  
Located in: type in the source that you found this item in  
Call Number: type in the item’s call number  
Comments: type in any special instructions for delivering

When you are through, and have double checked all the information, click on “Submit Request”.

If you need to place another request, click on “New book” or “New serial”.

### Replying to an ILL Request

Timely reporting on requested materials is an important management tool in the processing of interlibrary loan requests for our customers. Please see the WEB-ILL Standard Operating Procedures in this manual for step-by-step instructions. All WEB-ILL requests are directed to an email address supplied by the member library. These addresses are updated on a quarterly basis. Updates are made January 1, April 1, August

1 and October 1. You must have any necessary changes including email address or names to the KCMLIN Headquarters no later than 2 weeks preceding these dates in order to have changes reflected.

All items to be shipped should have a routing slip (books) or photocopy transmittal form (serials) with the item. Items should be clearly marked with the ownership information and placed in a KCMLIN courier envelope. Courier envelopes should be clearly marked with the intended destination of the item. The library name itself should be spelled out. PLEASE NO OCLC CODES, ABBREVIATION OF LIBRARY NAMES, OR, BRANCH NAMES WITH NO LIBRARY NAME INCLUDED. Since our couriers do not deliver to individual branches, they are not familiar with what branch belongs to what library.

#### Instructions for Receiving/Responding to Book/Serial Requests Through Email

Open your email program and go to your in box. Open the request message. (You can print it out for search purposes or for your records).

Do not respond until you physically have the item in your hand – this way you are certain you will be able to fill the request.

When you are ready to respond, click on “Reply”.

Scroll down to the line “status”. Type in the status of the request, for example: sending, checked out, reference or not owned.

Scroll down to the end of the message and type in any additional comments.

Click “send”.

You may then delete the message or move it to a specified folder to save it.

