

**Physical Delivery Recommended Practices:  
A Proposed NISO Work Item**  
Proposal for Consideration by the  
NISO Voting Membership  
Approval Ballot Period: August 3 – September 1, 2009

The following proposed work item is submitted on behalf of  
Valerie Horton, Executive Director, Colorado Library Consortium (CLIC)  
[vhorton@clicweb.org](mailto:vhorton@clicweb.org)

Proposal Last Modified: May 18, 2009  
Approved by the NISO [Discovery to Delivery Topic Committee](#) July 24, 2009

**Work Item Title**

Recommended Practices for the Physical Delivery of Library Resources

**Background**

Patron borrowing and lending is skyrocketing; in one state, borrowing of returnable items increased by 107.4% in six years.<sup>1</sup> A recent study found that 77% of academic libraries<sup>2</sup> participate in state or provincial resource sharing networks above and beyond the 10,000,000 interlibrary loan (ILL) transactions that OCLC annually processes.

The rapid growth in resource sharing is causing similar growth in both the use and costs of delivery systems.

- A 2008 survey found that library delivery systems are moving millions of items a year. One system reported 15 million deliveries.<sup>3</sup>
- In 2008, a survey of library delivery systems can cost as much as \$2,250,000 depending on the amount of materials moved.
- A nationwide ILL study showed that the mean paid by individual academic libraries for delivery was \$6,856, with some libraries paying as high as \$60,000<sup>4</sup>.
- This author estimates that at \$4.00 per USPS ILL transaction, American libraries are paying over \$25,000,000 to ship interlibrary loan items by mail each year.

The increased volume and costs of library delivery is creating a demand for more information about how to run efficient and effective delivery operations.

We know that library delivery is growing, is expensive, and is a crucial element in resource sharing. Up until very recently, little has been written about library delivery.<sup>5</sup> Fortunately, this fact is changing. In the last few years, three groups have formed to share knowledge about delivery. All three groups have

---

<sup>1</sup> Nationwide ILL borrowing, returnable rates are up 40.8% between 2000 and 2006. In Colorado, that increase is 107.4%. From "Interlibrary Loan among Academic Libraries – Ups and Downs in Colorado." Library Research Service's Fast Facts, January 28, 2009. [http://www.lrs.org/documents/fastfacts/266\\_ILL\\_academic\\_09.pdf](http://www.lrs.org/documents/fastfacts/266_ILL_academic_09.pdf)

<sup>2</sup> Sanchez, Elaine. "Higher Education Interlibrary Loan Management Benchmarks." New York, Primary Research Group, 2009.

<sup>3</sup> Results of a survey to be published in [Moving Materials: Physical Delivery in Libraries](#) by ALA Editions, 2009.

<sup>4</sup> Sanchez, *ibid*.

<sup>5</sup> See <http://clicweb.org/movingmountains/MovingMountainsBibliographyStudies.html> for a bibliography of publication on delivery.

expressed interest in partnering with NISO to further the development of recommended practices for library delivery.

- Moving Mountains Project – an ad hoc group with a steering committee of nine library delivery experts. The Moving Mountains group puts on a conference every other year, maintains a listserv of over 120 people involved in delivery, and is planning on hosting nationwide webinars in the near future. <http://clicweb.org/movingmountains/>
- 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. <http://www.rethinkingresourcesharing.org/delivery.html>
- American Library Association's ASCLA ICANS' Physical Delivery Discussion Group – the discussion group meets at every ALA Annual and Midwinter Conference and regularly sponsors programs at ALA conferences on delivery.

Other potential members include the Express Carrier Association; MCAA – the Messenger Courier Association of America; various consultants for the delivery industry<sup>6</sup>; carrier/vendors, such as Lanter; RR Donnelly; Velocity Express; American Courier; and others interested from within the NISO community.

### Statement of Work

The goal of this working group is to develop a statement of standard practices related to the delivery of library materials. Items to be included in the document might include:

1. Glossary
2. Standard practices related to:
  - a. Packaging
  - b. Shipping codes
    - Individual library code
    - State Code (such as postal codes)
    - International code
  - c. Labeling
  - d. Acceptable turn-around time
  - e. Lost or damaged materials handling
  - f. Package tracking
  - g. Ergonomic considerations
  - h. Statistics
  - i. Sorting
    - Manual sortation
    - Automated material handling system
  - j. Standardize on a set of elements to be used for comparison purposes to determine the costs for:
    - Delivery
    - Interlibrary loans
    - Patron Direct Consortia borrowing
3. Recommendation on linking regional and local library carriers
4. International delivery

The recommended standards would have the following benefits to the library community:

- Help new library delivery systems set up and establish procedures that have been proven to be effective.
- Help establish the justification for changing internal delivery procedures; for example, moving from a street address as delivery code to a short numeric code.

Physical Delivery of Library Resources: A Proposed NISO Work Item  
May 18, 2009

- Provide common practices to facilitate linking couriers systems.
- Serve as a vehicle to educate the wider library community about delivery.
- Help identify standard costs or benchmarks that can be used to compare and improve individual courier performance.

**Partners and Participation**

The following organizations/types of organizations should be involved.

- Statewide, multi-type consortium
- Multi-state consortium
- Multi-type library consortium
- American Library Association's ASCLA ICANS' Physical Delivery Discussion Group
- Moving Mountains Project
- Rethinking Resource Sharing's Physical Delivery Committee
- Regional services systems
- Large public library system
- Large academic library system
- International library/delivery representative(s)
- Regional service system
- Large delivery vendor
- Small delivery vendor

**Timeline and Activities**

Timeline to be completed within 18 months of working group formation.

<b>Milestone</b>	<b>Timeline</b>
Appointment of working group	Month 1
Completion of information gathering, including development of bibliography of existing information re physical delivery of library resources (to be made available on the NISO website).	Months 1-3
Completion of initial draft recommended practices document	Months 3-9
Comment Period	Months 10-16
Completion of final recommended practices document	Months 18

**Funding:**

N/A