



Mid-America Library Alliance

Interlibrary Loan & Courier Delivery Service Manual

2012-2013

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INTRODUCTION

The Mid-America Library Alliance (MALA) operates an interlibrary loan and courier delivery service for MALA member institutions.

As in any cooperative venture, the success of MALA'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 MALA'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 MALA Council.

INTERLIBRARY LOAN POLICY

Adopted 11/19/80

Revisions 2/6/99, 1/9/08, 7/09, 2/10, 8/12, 1/13

Policies stated herein are meant to encourage a liberal lending of materials within the network region, recognizing that the primary needs of one's 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 MALA 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 MALA 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: The sending library should be notified, a thorough search should be made at both the lending and borrowing libraries, and a report should be submitted to MALA as soon as possible via the online Courier Delivery Service Report Form at <http://mid-americalibraryalliance.org/forms/problem.php5> so that a search can be made.
- Replacing Lost or Damaged Items:

- **MALA Courier**

The MALA policy regarding missing items generally follows the [American Library Association Interlibrary Loan Code for the United States](#), which states:

The requesting library is responsible for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library. This includes all material shipped directly to and/or returned by the user. If damage or loss occurs, the requesting library is responsible for compensation or replacement.

If the borrowing library receives an article in damaged condition, please contact the owning library to work out a mutually agreeable resolution. You are responsible for the costs associated with the replacement of the lost or damaged items. The replacement cost does NOT include administrative or processing costs.

- **1st Choice Courier**

There is an online Courier Delivery Service Report Form you can complete at the following address: <http://mid-americalibraryalliance.org/forms/problem.php5>. It has a drop-down selection for lost or damaged items, among other items to report.

- Damaged Items: If it is determined after investigation that an item is damaged while in transit with 1st Choice, the costs associated with the replacement of the lost item will be 1st Choice's responsibility. If seeking replacement for a courier damaged item, the damaged item (with its courier bag and original label, if available) should be sent to the MALA office for review. Please send these items to the attention of the Special Projects Coordinator. Replacement cost does NOT include administrative or processing costs. If the exact item can be purchased new on Amazon or a related site at a less expensive replacement cost, this will be how the item is replaced.

- **AV and Non-book Materials**: For DVDs, CDs, CD-ROMs, VHS tapes, Cassettes, etc., careful packaging is recommended. Place in padded bags, bubble wrap, or cardboard box for extra protection. Broken media cases will not be replaced.

- Use of Routing Slips or Book Bands: Use a routing slip for all items you lend to other members. Fill in the necessary information including the name of your library. All materials circulating in the network must show clear ownership information.

REQUESTING MATERIALS THROUGH INTERLIBRARY LOAN

- **Book loans:** Requests may be done through OCLC, MALA's WEB-ILL system, 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.
- **Photocopies or articles** Requests may be done through OCLC, MALA's WEB-ILL system, 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 electronic or fax 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 online catalog on MALA's WEB-ILL are 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 MALA 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.

- **MALA's WEB-ILL:** MALA's WEB-ILL is an online searching and ordering system **only used by libraries without other ordering mechanisms such as OCLC, Show Me The World, etc.** WEB-ILL is an older technology that is being phased out, and it is suggested that you make direct contact via e-mail with the lending library.

Members have access to area catalogs through the WEB-ILL. Currently the following catalogs are online:

- DeVry University Library
- Kansas City Kansas Public Library
- Kansas City Library Consortia
- Johnson County Community College Library
- Johnson County Library
- Mid-Continent Public Library
- Topeka & Shawnee County Public Library

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

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. This includes items to KCMLIN, MALA, AMIGOS, and COKAMO libraries.

Effective July 1, 2009, each library is required to report their monthly statistics online. **Statistics for the preceding month must be reported by the 5th of the following month.** To report your statistics go to:

- <http://mid-americalibraryalliance.org/courstats/statsrpt.php4>.
- 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 malacourier@mid-americalibraryalliance.org.
- Your previous month total will appear, plus it will show you the month you are currently entering.
- 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 enter their items by number of courier tubs and bags. If your library is doing this, enter the number of tubs and bags and then enter any other single miscellaneous items in the individual items column.

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

Hub Libraries: For libraries serving as or using a hub location, each organization is responsible for tracking their own statistics. For libraries serving as a hub, only report your organization's outgoing items.

MALA 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 MOBIUS Academic Libraries. Public Libraries such as Springfield-Greene and Missouri River Regional are on the MALA Get Connected courier service and should be counted as an item going out on the MALA 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

Acceptable Materials

MALA 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 MALA office at (816) 521-7257 or 1-877-600-9699 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

If you need additional supplies, please contact the MALA office using the online Courier Delivery Service Report Form at <http://mid-americanlibraryalliance.org/forms/problem.php5>, by e-mail at malacourier@mid-americanlibraryalliance.org, or by phone at (816) 521-7257 or 1-877-600-9699.

Bags: MALA provides nylon bags. You will receive an initial supply when signing up. If you begin running short, contact the MALA office and an additional supply will be sent. If you have a surplus of bags, please send them back to the MALA office for redistribution.

Courier Pick Up Forms: On each courier delivery day, the couriers will sign in and out on a courier pick-up form. Please have these forms available and easy for the couriers to sign. There are instructions for filling this out later in the manual. These forms are for 1st Choice only.

Shipping Labels: Shipping labels can be printed from the MALA web site at: <http://mid-americanlibraryalliance.org/courier.html>. These are the ONLY labels to be used. Please do not create your own labels.

Bag Ties: Should you wish to use security ties (optional), bags of 1,000 are available for purchase from MALA. Please contact the Special Projects Coordinator for more information.

Closings

The dropsite is responsible for informing MALA if they do not need courier service for a protracted period of time (for example, due to library closure for construction, disaster, etc.). This saves the courier from making unnecessary trips.

Please send the MALA Administrative Office notice of any days you will be closed. Schools and academic libraries should notify MALA of spring breaks, Christmas/ Thanksgiving breaks, and summer break schedules. Closure notices can be submitted through the Courier Delivery Service Report Form at <http://mid-americanlibraryalliance.org/forms/problem.php5>, by e-mail at malacourier@mid-americanlibraryalliance.org, or by phone at (816) 521-7257 or 1-877-600-9699.

REPORTING OF PROBLEMS

Missed Scheduled Delivery

The MALA Get Connected courier should deliver/pick up every day you have a scheduled delivery. If the scheduled stop is not made, please complete the online report form immediately:

<http://mid-americalibraryalliance.org/forms/problem.php5>

In the event of inclement weather, the couriers will often run a later shift. The MALA 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 10 days after routing is reported to you, please submit a problem report on the MALA website at <http://mid-americalibraryalliance.org/forms/problem.php5> so an email can be sent to the rest of the ILL departments 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://mid-americalibraryalliance.org/forms/problem.php5>

For seeking replacement for a courier damaged item, the damaged item (with its courier bag and label, if available) should be sent to the MALA office for review. Please send these items to the attention of the Special Projects Coordinator.

AV and Non-book Materials: For DVDs, CDs, CD-ROMs, VHS tapes, Cassettes, etc., careful packaging is recommended. Place in padded bags, bubble wrap, or cardboard box for extra protection. Broken media cases will not be replaced.

PACKAGING AND ADDRESSING

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

Bags/Boxes/Tubs

All MALA 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 MALA Get Connected/MOBIUS delivery site. Use the Get Connected labeling system which includes all deliverable sites at: <http://mid-americalibraryalliance.org/courier.html>.

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. All of these bags are interchangeable and can be used on your MALA Get Connected Service. These bags include:

Red and Blue Nylon MALA Get Connected bags

Green KCLC Canvas Bags

Black Nylon and Canvas MOBIUS bags

Purple Nylon Trans-Amigos Express 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 (optional).

- **Tubs**

Some libraries will utilize tubs to send materials back and forth through the MALA 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 MALA 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 ship on the MALA Get Connected courier. Make sure to completely seal the box or envelope, and provide an appropriate address label from the label maker on the MALA website. Please do not send any envelope smaller than 8 1/2" 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.

Boxes may not be used to send materials to Extended Service Areas, including Amigos and COKAMO. Please use courier bags exclusively to share resources with these partners.

Proper Addressing

For all MALA Get Connected members moving things in or out of the Kansas City Metropolitan area, please use the labeling system found on the MALA web site. There are three label makers:

- For all Get Connected members and MOBIUS libraries, use the KCMLIN Basic Services labels at <http://mid-americalibraryalliance.org/labels/basic/labels.php>
- For Extended Services members sharing with COKAMO libraries, use the MALA Extended Services/COKAMO labels at <http://mid-americalibraryalliance.org/labels/cokamo/labels.php5>
 - In addition, please note the special packaging and labeling instructions for sending to COKAMO at <http://mid-americalibraryalliance.org/extended.html>
- For Extended Services members sharing with Amigos libraries, use the MALA Extended Services/Amigos labels at <http://mid-americalibraryalliance.org/labels/malamigos/mala-amigos.php5>. **Please do not use the labels on the Amigos label maker to route to any Basic Services members.**

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.

MALA Get Connected mailing labels can be found at:

<http://www.mid-americalibraryalliance.org/labels/basic/labels.php>.

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 are 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.

LIBRARY DROP SITE RESPONSIBILITIES

1. All shipments must be prepared in advance. Drivers cannot wait while packaging, labeling or paperwork is completed. The drop site 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 drop site representative is responsible for checking the TO: address on pieces received and refusing any packages not addressed to the dropsite.

3. The drop site 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://mid-americalibraryalliance.org/forms/problem.php5>.

All missed stops must be reported to MALA through the online report form, as well.

GET CONNECTED LIBRARY PROCEDURES

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

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://mid-americalibraryalliance.org/forms/problem.php5>.

The driver will come to the 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 MALA Get Connected libraries to govern no-charge lending among MALA 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.

Responsibilities 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.

APPENDIX B: LIBRARIES PARTICIPATING IN LENDING AGREEMENT

For a current list of the MALA members and collaborative partners, please visit our website at <http://mid-americanlibraryalliance.org/index.html>.

APPENDIX C: MALA 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://mid-americalibraryalliance.org/webill.html>

Click on the lady reading a book. The password is kcmlin. All the different databases of MALA 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 MALA 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 MALA 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.